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¹ Source: Growing Sprout into Toys Study, Insight Strategy Group, December 2013. Among a sample of W18-34 with K<6 (n=604).

² Source: MRI Doublebase Gfk 2013 Cable Study, W18-34 last 7 day viewers; index rank among kids networks in response to "My family/friends often ask and trust my advice on products for babies/children".

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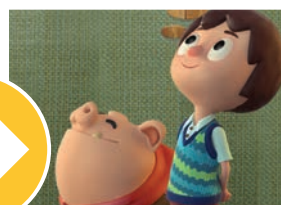
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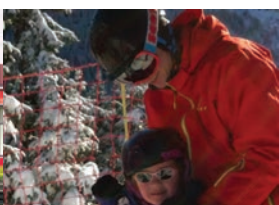
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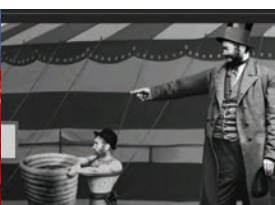
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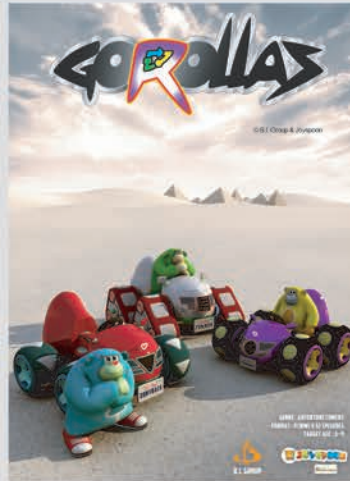


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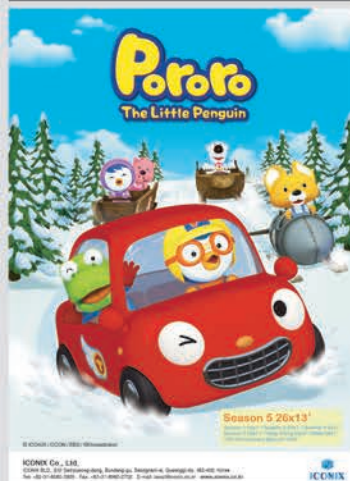
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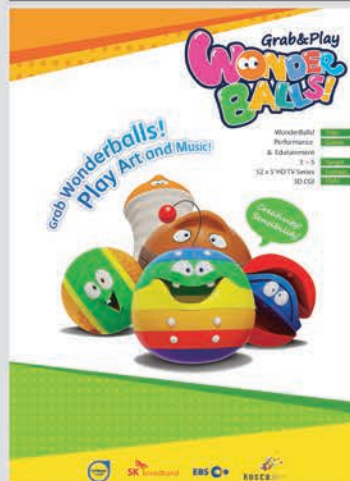
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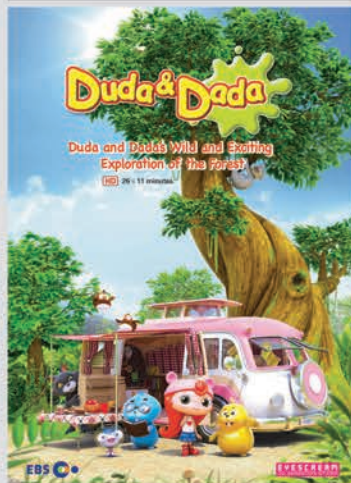
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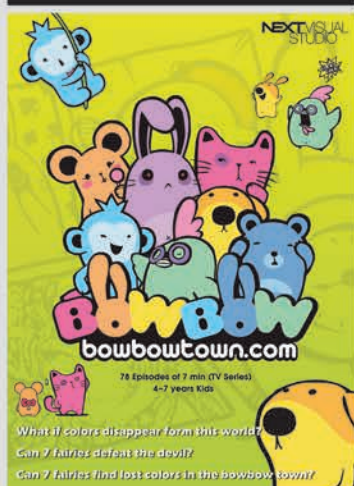
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Feeling faint?

Thanks to having spent the last four months planning a four-day, 150-plus-speaker event program, I think I may have a bout of Kidscreen Summititus. I've memorized the entire session schedule, and yet I can't stop thinking I've forgotten something—to the point that it invades my dreams. The good news for you is, I believe this may be a singular affliction. However, I would contend that the entire kids industry has come down with a substantial case of the S.V.O.DTs.



But unlike the tremors caused by alcohol withdrawal, these DTs leave industry execs with the shakes as they stare into the uncertain future of linear television, prompted by the release of each new Netflix quarterly report. The thing is, we know kids are watching more video content than ever; it's just a question of how they're watching it and where—and that's what has everyone in a bit of a tizzy. The US kids cablenets aren't in immediate danger of seeing their ratings drop off a cliff, but

with the likes of Amazon, Netflix and Hulu investing more in kids originals, and making serious plays for exclusives and second windows to drive subscriptions, the competition is stiffer than it has ever been.

So what does the audience think about all this? Are kids differentiating between linear nets like Nick and Disney and the Netflixes of the world? Are they really gravitating to one over the other? There's not a lot of hard data published about this, but in this issue's "TV on their time," (p.57), respected kids & family research firm Smarty Pants does a bit of digging into the matter, evaluating these players through its proprietary Kidfinity ratings, which identify the brands that capture kids' and moms' hearts, time and purchase power. The upshot of Smarty Pants' findings is that the 6,700-plus kids surveyed for the study put YouTube and Netflix on an equally "cool" footing with Disney, Nickelodeon and Cartoon Network. Moreover, both SVODs provide that all-important instant access to the content kids want to watch when they want to watch it, and they also offer a much bigger selection than network-owned streaming services or apps.

But Smarty Pants' findings also point to areas where Netflix and YouTube, in particular, lag behind linear kidsnets. The children surveyed uniformly ranked the SVODs far lower than their traditional rivals in being age-appropriate, detracting from kids' affinity for those brands. Perhaps even more importantly, the SVODs scored lower than the Big Three in their fun factor—meaning kids generally feel kid-targeted networks do a much better job of catering to who they are and what amuses them. It's not surprising kids feel like that, given the fact that Cartoon Network, Disney and Nickelodeon have built their businesses around super-serving their audiences in just that way. And if these nets continue to innovate on the age-appropriateness and fun fronts, regardless of platform, I think the S.V.O.DTs will eventually subside.

I hope to catch up with a lot of you in the Big Apple. Remember, Summititus is not contagious!

Cheers,
Lana

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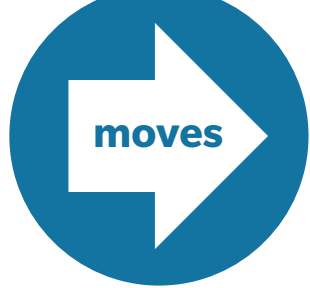


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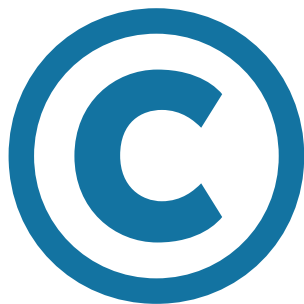
The List

Five things on our radar this month



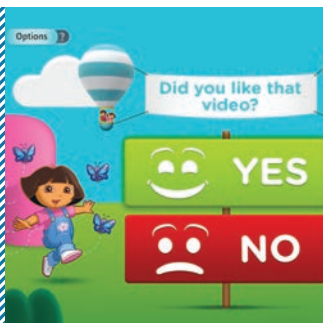
1 Paying the toll

The ongoing controversy brewing around children and in-app purchases has come to a head—at least for Apple. The tech giant has been ordered by the US Federal Trade Commission to dole out a total of US\$32.5 million in refunds to in-app purchasing consumers. This comes as parents continue to complain about kids mistakenly racking up in-app charges while other global watchdogs like the UK's Office of Fair Trading look on. With more companies expected to reach FTC settlements of their own in the coming months—and freemium apps continuing to drive revenues—expect to see more developers treading carefully around in-app purchases in kids games. Parental controls will continue to rise. Mobile creators will drop more dollars on compliance—and the result may actually leave everyone better off in the long run.



2 TV copyright fight looms

The US Supreme Court will hear arguments in April that could shape American broadcasting for years to come. The case sees major US networks like CBS, NBC and ABC appealing a previous ruling that allows New York-based Aereo to collect free over-the-air broadcast signals and distribute them via the internet for a monthly subscription fee. The copyright implications are complex, but the upshot is that the ruling could change how broadcast networks package their content and what it'll cost consumers.



3 Nick Jr. on demand

Nickelodeon's latest venture, US-based VOD channel My Nickelodeon Junior, says a lot about how traditional kidsnets are adapting to compete with the Netflixes of the world. Inspired by personalized media services like Pandora, My Nick Junior combines both scheduled programming and on-demand options. With themed controls for parents and rating options for kids, the ad-free channel is not expected to cannibalize Nick's linear networks, but its mere existence in the TV guide is a clear sign of the times.



4 Hybrid gaming scores sales

NPD's latest report on videogame software sales doesn't bode well for traditional formats. The segment experienced an 11% decline in 2013. Sales of interactive gaming toys, however, grew a whopping 70%, led by Skylanders and Disney Infinity, which just cracked the three-million-unit sales mark. It's almost a no-brainer to say a big videogame format shift is well underway.



5 An ice-cold hot streak?

Walt Disney Animation Studios' *Frozen*, now with two Oscar nominations and more than US\$700 million accrued at the box office, has become a symbol of change for the House of Mouse. It's the biggest hit to emerge from the animation unit since *The Lion King*. And while Disney Animation propels itself forward with a '90s-esque momentum, its sibling Pixar is waiting out 2014 with no theatrical releases on its slate.

➔ To keep up with the news as it happens, check out Kidscreen.com daily.



Growing up in Hong Kong and the UK, before moving to Australia in 1975, helped shape New Zealand-born Deirdre Brennan's worldview and her 27-year career in television. Now back at ABC Children's, she's primed for more adventures.

An international career comes full circle

The gig Australian Broadcasting Corporation's head of children's television, overseeing children's content production, programming, brand strategies and acquisitions for ABC4Kids, ABC3, online and ABC's iView player.

Drawn to it Although she once aspired to be a ballerina, a Broadway musical star and/or a barrister, television has always been one of Brennan's fascinations. With kids TV favorites ranging from *Michael Bentine's Potty Time*, *Blue Peter* and *Tomorrow People* in the '70s to *Press Gang* and *Degrassi* in the '80s, her love of the medium eventually led her to the ABC. She became one of Australia's first female television announcers in 1986 while studying economics and law at Sydney University. Having discovered her true passion at the ABC, Brennan quit law school and moved her way up the ladder, taking on a number of roles including choreographer, stage manager, director and marketing planner. "I was incredibly lucky to work with many passionate people within Australia's public broadcaster, particularly one senior TV executive, Sue Lester, who gave me the rare chance to get out from behind the microphone and move into programming," says Brennan. "Once I discovered the magical world of kids, producer and then ABC colleague Donna Andrews (who launched the ABC Kids digital channel) was the best guide you could ever have. She shared her knowledge and experience—and still does to this day."

Programmed for success Taking a full turn to children's TV, Brennan became ABC's kids programmer in 2001, before moving on to Nickelodeon Australia in 2007 for a three-year stint as its programming director. She says jumping from a free-to-air public broadcaster to the pay-TV environment was her biggest career challenge. "I had to be open to new ways of working. I had to learn how to work within a global organization, build an understanding of a new and smaller audience, as well as manage the commercial realities of the entertainment business," she says. After Nick, Brennan switched gears, leaving the dedicated kids space to take a post at BBC Worldwide Australia, where she eventually became content director for Australia and New Zealand.

Big Apple love Of all her accomplishments, Brennan says her career-making moment came in 2004 while attending Kidscreen Summit in New York. "I realized the power of collaboration within

the international children's industry, and I met people there who have become friends for life," she says. "We also got caught in a snow storm, which was the first blizzard I ever experienced!" One of her more recent career highlights happened while working with BBC UK on Jane Campion's acclaimed television drama *Top of the Lake*. "I never cease to be amazed by the creative community and its drive to produce great content across all genres. From the Micheal Carringtons, to the Adina Pitts, Josh Seligs and Hensons, everybody has such an incredible amount to contribute," she says. And one of the most important things she's learned about kids programming has, in fact, become her mantra. "Never, ever forget that it is an honor to be invited into the life of a child and their family. It informs how you program, what you make, how you speak to kids and the respect that comes with it," she contends.

Home again While loving her work at BBCW, Brennan went back to where it all began in January. "I am looking forward to utilizing the skills I developed within two great global organizations to do the very best job for Australian kids," she says. "Public broadcasting is my spiritual home." —Jeremy Dickson



Expectations are high for ABC3's newly launched teen fantasy series *Nowhere Boys*

Out of Office

Tales from the frequent fliers club



Stephanie Betts

VP of Development,
DHX Media

1. In my carry-on

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My BlackBerry. I like to kick it old school... and support fellow Canadians.

3. On the fly

I sit near children—they know everything I need to know.

4. Preferred in-air tunes

Oh, no. I don't do music on planes. I'd be dancing in the aisles.



5. Best in-flight food

My own sour candies or the olives in a martini.

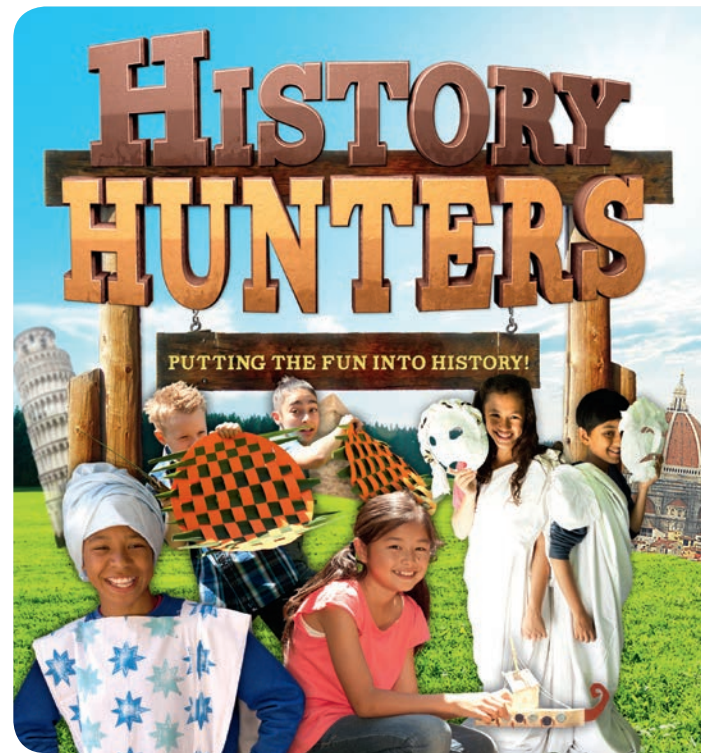
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Hank Zipzer heads to TV

Noted sitcom actor Henry Winkler opens up about his new live-action show on CBBC and the very personal reasons behind the creation of its source material

Growing up in New York in the '50s, Henry Winkler always knew he wanted to be an actor, despite suffering from low self-esteem and dyslexia. Through sheer tenacity and self-taught coping mechanisms, he earned his high school diploma and eventually a Master of Fine Arts from the Yale School of Drama in 1970. The rest, as they say, is history. Winkler went on to play beloved character The Fonz in hit sitcom *Happy Days* in the late '70s, and endeared himself to a brand-new fan base as bumbling Bluth family lawyer Barry Zuckerkorn on *Arrested Development*. And the 68-year-old continues to shine as an actor, producer, director and author. In fact, he's co-written 17 Hank Zipzer: The World's Greatest Underachiever books with acclaimed L.A.-based children's author Lin Oliver. To date, roughly four million copies in the New York Times bestselling series have been sold worldwide.

Winkler is now starring in a live-action TV adaptation of his Walker Books-published series, commissioned by CBBC from Walker Productions and DHX Media. Produced by Kindle Entertainment (with Walker Productions, DHX and Screen Yorkshire), the 13 x half-hour live-action series debuted on BBC's iPlayer on January 21 and on CBBC a week later. It follows the humorous adventures of Henry "Hank" Zipzer, a smart and resourceful 12-year-old boy with dyslexia, whose creation was inspired by Winkler's own experiences growing up with the condition.

We took the occasion to ask Winkler about the new series, the progress of the Zipzer books and why he loves working with kids.

You've worked on shows for teens and families, done voice work for animation and authored successful kids books. Why the love for children's entertainment?

On the one hand, I don't know. On the other hand, because I grew up dyslexic, with very little support, I knew that I was going to work with children. And if I couldn't earn a living being an actor, I would have worked with children exclusively in some way to ensure their self-image was strong. I truly believe that self-image is the beginning and the end of living.

Did you ever think you would become an author?

I never thought I could write a book. When it was first suggested I should write a book for kids about my dyslexia, I dismissed it out of hand. When you grow up thinking you're stupid, it stays with you an awfully long time. I was eventually given a second opportunity, and that time I was smart enough to say, 'I'll try it,' and I took a meeting with Lin.

➞ ZIPZER CONTINUED ON PAGE 28



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Dynamic duos

Australia's Cheeky Little Media readies *The Kazoops* for the world

Who After years spent working in the kids entertainment business, including stints at Sydney-based Ambience Entertainment (*Erky Perky*, *The Adventures of Figaro Pho*), animation producer and director David Webster and executive producer Patrick Egerton decided to pair up to create their own studio. And just seven months since launching Cheeky Little Media in Sydney, the duo is hard at work shopping three animated series in development and catching the attention of broadcasters worldwide. Clearly a team on the rise, the same could be said of Monty and Jimmy Jones, the two main characters from Cheeky's CGI-animated series, *The Kazoops*.

IP evolution When Webster and Egerton were both at Ambience, they were looking for a new preschool IP with a strong musical element attached. As it turned out, friends of theirs were in the very early stage of developing a property called *The Moops*. "The music was strong and there was something in the design that had real charm," says Egerton. "So we agreed to option the IP about 18 months ago." With no scripts and a concept in an embryonic state, Cheeky dove into development and eventually enlisted support from ABC Australia. With the broadcaster's help and funding from Screen Australia, the pair was able to pitch the renamed series, *The Kazoops*, at the Asian Animation Summit (AAS) last December, where it snapped up the coveted Best in Show prize among a strong field of competitors. The story concept for the reworked 78 x seven-minute series for three to fives follows the adventures of a spirited six-year-old boy named Monty and his best friend and loyal pet pig, Jimmy Jones. In each ep, Monty confronts a preconception about the world, and with Jimmy in tow, embarks on an imaginary journey that opens his eyes to new viewpoints. Every episode also features an original song from Sydney-based musician Scott Langley (think pop crooner Jack Johnson, but for kids).

What's next Aside from its big win at AAS, the series has garnered attention from CBeebies, and Cheeky is currently in discussions with the kidsnet. "We have interest in the US, as well, and some more crystallized interest from Germany's KiKA," says Egerton. The team hopes to have the series in production by July 1 after finalizing its broadcast and co-pro partners, a distributor and the remaining 40% of its US\$6.5- to US\$7-million budget. Webster and Egerton have also developed an app strategy for the IP and are addressing opportunities in music publishing. "We are in advanced discussions with print publishers for traditional books with music inserts, and eBooks would be a fantastic way to make these stories available, too," says Egerton.

Additional projects for Cheeky include two 52 x 12-minute shows for kids eight to 12— CGI-animated comedy and book adaptation *Bottersnikes & Gumbles*, and 2D-animated *Spongo and Fuzz*. Australia's Channel 7 and CBBC in the UK have shown interest in the former, while talks are underway with Disney EMEA and Australian broadcasters for the latter.

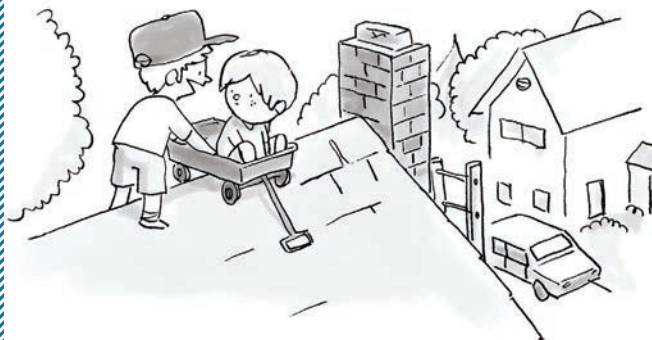
—Jeremy Dickson



The Kazoops snapped up the best-in-show award at the Asian Animation Summit in December

Know your audience

By Jim Benton



"We know you have a choice when you fly and we'd like to thank you for flying Air Billy."

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Branching out

FremantleMedia Kids & Family Entertainment is beginning to reap the rewards of its global brand strategy with a crop of emerging IPs loaded with long-term franchise potential

The news of FremantleMedia Kids & Family Entertainment president Sander Schwartz's departure last fall left many in the industry questioning the organization's future. But the swift hire of ex-Mattel exec Rick Glankler as EVP and GM in late October was a sure sign Fremantle meant to stick around in the kids business. In fact, New York-based Glankler and his executive team (Bob Higgins, EVP of creative and production; Carl Lumbard, head of global licensing and consumer products; Joss Duffield, VP of distribution and sales; and Tessa Moore, VP of brand management) have hit the ground running to drive the business globally.

Right now the focus is on continuing to grow FME Kids & Family's portfolio of brands including Tree Fu Tom, Strange Hill High, Max Steel, Grojband, Ella the Elephant, Kate & Mim-Mim and Wizards Vs Aliens. "I've been impressed on several fronts with the company's great partnerships," says Glankler. "In particular, its new five-year output deal with the BBC, a first-of-its-kind deal that

will create distinctive new content for kids over the next handful of years."

Glankler says staying on the lookout for IPs with true franchise potential is also key.

Case in point are preschool property Tree Fu Tom and kids comedy brand Strange Hill High. Since becoming the highest-rated program for kids ages four to six on CBeebies in 2012, *Tree Fu Tom* headed across the pond to US preschool channel Sprout last spring, earned a second series pickup from in-house co-producer CBeebies last fall and spawned a major UK retail campaign at Toys 'R' Us and The Entertainer. More UK brand activity (live shows, a dedicated zone at Alton Towers' CBeebies Land attraction) will kick off this year in support of the property's spring/summer toy launch from Flair.

Strange Hill High (13 x half hours) has been picked up by ABC3 (Australia), Zoom (Israel), K2 and Frisbee (Italy), and okto (Singapore) since successfully



With a second season in the works, *Strange Hill High* has scored a slew of new broadcast and CP deals

debuting on CBBC last May. Among the IP's 13 UK licensees are Vivid (master toy), Egmont Publishing (magazines) and Fashion UK (apparel), while new partners in Australia include Banter Toys (distribution), Hardie Grant (publishing) and Shock Entertainment (home entertainment). Products are set to launch this spring in the lead-up to the show's second season debut on CBBC and ABC3 later this year.

"We've just started to hit our success points over the last 12 months. And now that these shows are going global, the focus is on how to establish them as global franchises, not just as new brands, but as enduring brands in all of the markets," says Glankler. "It's about creating long-lead plans, investing in second, third, fourth and fifth series, as well as investing in new brands and distribution. Consumers want immediacy."

As far as how many new shows the division expects to launch each year, Glankler says there are no steadfast rules, but his intention to build FME Kids & Family's portfolio with new properties is clear. "It's a matter of quality over quantity. We're focused on finding great stories and then bringing them to life." —Jeremy Dickson



⇒ ZIPZER CONTINUED FROM PAGE 24

Music teacher Mr. Rock, who you play in the series, is based on your own high school teacher who believed in you. How do you feel about the role?

I couldn't really think about that because I had so much work to do in a short period of time. [The series' filming took place over 12 days last October.] All I could think about was making his scenes emotional, real and funny. He was the teacher who said to me, 'Winkler, when you do get out of here, you're going to be OK.' Now, when I speak to children all over the world, the one thing I tell them is that you really don't know how powerful saying one positive sentence to someone can be. I took that one sentence from Mr. Rock and I kept it in my heart.

As an actor and writer, how do you cope with dyslexia?

You learn to negotiate it. I accept the fact that I'm not going to read the words as they are written. One of my coping mechanisms is that I adlib. I know the nature of a scene, I know most of what's written, but if I can't remember exactly what the words are, my brain is writing a brand-new script as I'm standing there—you can only imagine how that works for Shakespeare.

Are there plans to continue the book series as Hank grows up?

We just wrote an 18th book, *Hank's Book of Pickles, Whoops I Mean Lists*, which is a book of lists that Hank is in the habit of writing. We have other brand-new novels coming and we've written four books in a new series—Here's Hank—that follows Zipzer in the second grade, before he was diagnosed with dyslexia.

What's next for you? Any plans for Hank Zipzer movies?

I'll be touring the new Hank books with Lin in the US, and then I'm going to make a pilot for a new family show for ABC. We have 13 episodes of *Hank*, and we'll see where it goes—it's like walking Las Vegas, you roll the dice. I always envision myself at the slot, leaning over, pulling the handle, sliding in and hopefully it all comes up cherries.

—Jeremy Dickson

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Carbon Media's short film *Five Kangaroos* is the first indigenous Australian content to appear on *Sesame Street*

Striking a balance

Armed with increasingly accessible and distinct kids content that taps into their unique stories and skills, indigenous prodcos are breaking new ground and raising awareness around the globe

BY JEREMY DICKSON

On January 23, the US version of *Sesame Street* included a brand-new mixed-media 1:45-minute film as part of its numbers segment and 44th season. The educational music video, *Five Kangaroos* from Brisbane, Australia-based prodco Carbon Media, is short, but its impact may be long-lasting. Its acquisition by Sesame Workshop marks the first time indigenous Australian content has been included on the iconic children's television show.

For Carbon Media's Wayne Denning—owner and executive producer of the Aboriginal-owned-and-operated studio—securing global, mainstream exposure for the vibrant *Five Kangaroos* is particularly meaningful. So many perceptions around indigenous communities are often related to disadvantages and negative social and economic issues, but this short should engender the exact opposite reaction.

"A lot of Aboriginal people feel disengaged because of [these perceptions], so we're all about portraying positive images and storylines based on our oral and cultural traditions," says Denning. "We are incredibly excited to be promoting indigenous children on one of the world's most successful children's programs, where they can see themselves, their art and traditions, and feel proud and included."

When the project, which is set to air in March in Australia, was first pitched to Sesame last February, the nonprofit was particularly taken by the kids in the live-action/animated short. And the art, music and featured singing talents of

successful Australian pop star and actress Jessica Mauboy (*The Sapphires*), who happens to be Aboriginal, were a definite bonus.

"*Five Kangaroos* was something different and unique," says *Sesame Street* producer Kim Wright. "Seeing a group of beautiful kids that other kids around the world might not have been exposed to was a strong selling point."

While Carbon's content has attracted broadcasters like Australia's National Indigenous Television (NITV) and global indigenous networks, Denning hopes the company's breakthrough with *Sesame Street*, and additional series sales to ABC Australia (kids game shows *Letterbox* and *Go Lingo!*, interstitial series *Handball Heroes*) will help lead to more mainstream international deals.

"Yes, the company is proudly Aboriginal, and there is an element of us making content for indigenous broadcasters in Australia and around the world, but to me the greatest impact is getting on a show like *Sesame Street* or on a channel like Disney," says Denning. "A strong push for Carbon, which also creates documentaries, TV commercials and digital content for adults, is to make more Aboriginal-themed content styled to a global audience."

To help on the funding front, Carbon was one of four companies selected for Screen Australia's 2013 Enterprise Program that doled out US\$2.2 million in support to Australian producers. The three-year funding term, earmarked for development, is a first for Carbon, which launched in 2006.

Spirited storytelling

Another indigenous kids content producer with production expansion and mainstream broadcast deals on his mind is Charles “Chuck” Clément, owner of Media RendezVous. The Aboriginal-owned, multi-platform content producer is based in Winnipeg, Canada.

Since launching in 2007 under the direction of Clément and his brothers Patrick and André, Media RendezVous has produced programs in English, French and Aboriginal languages across a number of genres including children’s, music, factual, sports and variety. The third season of its environmental adventure-comedy series *Planet Echo*, for kids eight to 12, premiered on Canada’s Aboriginal Peoples Television Network (APTN) in January. (A fourth season will be completed by the end of this year bringing the series’ total to 52 eps.) The co-production with Toronto’s Positive Productions is financed in part by Canada’s Bell Fund, the province of Manitoba and APTN. It was also acquired by Canadian educational networks Knowledge Kids (seasons one and two) and French-language SCN (seasons one and three).

On the digital side, Media RendezVous partnered with a local app developer, IDFusion, in 2012 to create a free science-themed iPad app. *Dr. Greenie’s Mad Lab* (Dr. Greenie is one of the characters from *Planet Echo*) features a stand-alone appisode, games and activities. And a second app, *Dr. Greenie’s Magnotronic*, launched last month with brand-new exclusive content.

“Hopefully kids who discover us on their iPads will Google us or find us on APTN, its website, or anywhere else *Planet Echo* is found,” says Clément, who’s also an executive producer, writer, director, host and actor with Métis and French-Canadian roots.

He says the company’s multi-platform investment and growing TV experience has helped gain the attention of non-indigenous networks.

“APTN remains a terrific partner, but certainly having more experience, and more awareness being drawn to some of our productions, has allowed us to now work with other broadcasters,” says Clément.

Sustaining momentum

While his company has found success, Clément notes that the Canadian landscape is beginning to get crowded as more Aboriginal writers, producers and storytellers enter the scene.

“One of the biggest challenges for indigenous kids programming is that APTN is the only Aboriginal-focused broadcaster in Canada. Even though they have a great mandate and a stellar legacy, it is still only one broadcaster with finite resources,” he contends.

“APTN is also the greatest opportunity because they want to hear our stories. We hope that other broadcasters, including public broadcasters like the CBC, will start to shoulder some of the responsibility alongside APTN and pay more attention to this really important community that is the fastest-growing population in Canada.” According to Statistics Canada, 1.4 million people reported having an



Landslide Production’s newly launched APTN series *Louis Says* promotes language learning and community involvement

Aboriginal identity in 2011, a 20% rise from 2006, versus a 5.2% uptick in the non-Aboriginal population.


However, APTN’s director of programming Monika Ille says people should not expect any big changes in the landscape just yet. “Would other broadcasters be interested in kids shows with Aboriginal content? Not really. Producers often approach them with shows and they send them to us,” she says.

Broader audience

While it’s obvious a sea change isn’t in the cards just this minute, Clément and Denning say producers need to maintain strong relationships with their respective countries’ government-funded screen agencies that support international co-production opportunities to better compete on a global scale.

“Forming relationships with global partners and broadcasters around the world is something we wouldn’t be able to do without the support of our government agencies like Screen Australia and Screen Queensland,” says Denning. He also stresses the importance of attending leading markets like MIPCOM and Kidscreen Summit to learn the broader requirements of success.

The nurturing of up-and-coming indigenous talent through more training programs, according to Screen Queensland COO Jennie Hughes, is also key for the future of indigenous programming. “The challenge is making sure you have enough people going into the sector and then nurturing the talent,” Hughes says.

Looking to boost their respective lineups, both Carbon and RendezVous have a number of new projects in the works. Clément says his team has two new series in development with APTN and the Canada Media Fund—a multicam teen sitcom (working title *Rebels*) with Toronto partner Heroic TV that would be APTN’s first-ever sitcom, and *Canot Cocasse* (*Crazy Canoe*), a French-language live-action/animated preschool series. For its part, Carbon currently has three kids projects in development, including animated preschool series *Too Many Cheeky Dogs* and *The Puggles*. 

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Animated preschool series *Wanda and the Alien* is one of many new original programs set to launch on Milkshake! this year

Stirring it up

Channel 5's Milkshake! zeroes in on new animated series and grows its VOD library

The channel Despite competing with a large number of preschool children's channels in the UK, including chief rival CBeebies, Channel 5's Milkshake! has made a strong name for itself since launching 15 years ago as the free-to-air broadcaster's daily morning block for the two to seven set. Its focus on high-end, story-driven animated series, and judicious use of presenter-led series and docs, has helped Milkshake! to reach an average of 60% of all UK kids ages four to nine. In 2013 alone, 19 million viewers tuned into the terrestrial block.

The majority of its programs are also offered through VOD (UK-based IPTV service YouView's Milkshake! portal generated 11.5 million streams in 2013), and programming can be accessed via the Demand 5 iOS and Android apps and online at milkshake.channel5.com. The block is currently on the lookout for new original animated co-productions that are fast-paced, bold and colorful, as well as content fit for on-demand viewing, as opposed to straightforward acquisitions, formatted shows or anything overtly educational.

The programming Airing 24 hours of programming each week from 6 a.m. to 9:15 a.m. on weekdays, and 6 a.m. to 10 a.m. on weekends, Milkshake!'s lineup features a strong existing library of hit shows, including *Peppa Pig*, *Thomas & Friends* and *Bananas in Pyjamas*, and UK-exclusive series such as *The Mr. Men Show*, *Rupert Bear* and *The Little Princess*. "We commission and co-produce a lot of British programming, but we also work with producers internationally both in terms of co-productions and acquisitions," says head of children's content Jessica Symons.

Of the block's 30 shows currently in rotation each week, 18 are original (commissions, co-productions,

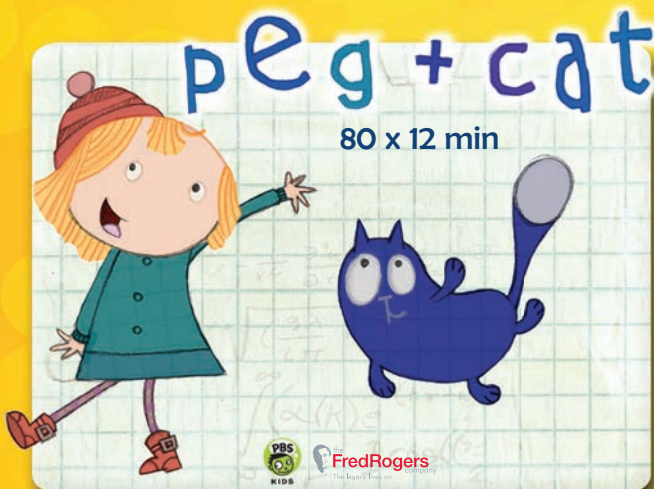
in-house productions), two are reversioned shows, and 10 are acquisitions. One of its top in-house shows is currently *Milkshake! Bop Box*, which features

music produced by presenter Kemi Majeks. Other top-rated core programs include Komixx Entertainment's stop-motion series *Toby's Travelling Circus*, *Ben and Holly's Little Kingdom* from eOne and DreamWorks Classics' *Noddy*.

In with the new For new original animated programs expected over the next 18 months, Symons says viewers can look for Cosgrove Hall Fitzpatrick's series *Pip!* to hit the channel, along with Random House Children's Screen Entertainment's *Wanda and the Alien* (spring 2014), London-based Lupus Films' *Toot the Tiny Tugboat* (adapted from Sebastian Braun's book *Toot and Pop!*) and Red Kite Animation's *Bradley and Bee*.

"For 2015, Dramatico Animation's 52 x 11-minute *The Wombles* will also be a key series for us," says Symons. "It usually takes a couple of years to make high-end animated programs, so we're beginning to see the fruits of this support come through now with a raft of predominantly UK-produced animated series. However, this many new shows launching is on the high end for us."

Branding drive On the marketing front, Milkshake! offers in-house produced promos and clips targeting both parents and kids, online early-learning competitions, live on-air awards and photo contests that support host/viewer interactivity, and lots of themed weeks. "These might be seasonal, highlight character brands or reflect what is going on in the country," says Symons. The channel also engages in off-line live events such as its recent year-long *Milkshake! Live Come Out To Play* nationwide theater show, which featured five key brands and all five of the block's regular presenters. "We also have a lot of marketing support behind our digital activities, particularly YouView," adds Symons. —Jeremy Dickson



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Pipeline

An early peek at shows on the development track



Bradley and Bee Based on *The Adventures of Bradley and Friends* from Hungry Boy Productions' Scott Downie, *Bradley and Bee* follows the lives of seven-year-old Bradley and his five-year-old sister, Bee. The pair owns a magical pop-up book that transports the siblings to exotic locations via Bradley's toy model plane, Victor. The series, which celebrates cultural diversity, books and comedic storytelling, focuses on problem-solving as the duo must, for example, figure out ways to herd bison, save snakes and help hippos with a bad case of the hiccups.

Producer: Bradley and Bee Limited (Red Kite Animation, Digimania)

Style: CGI animation

Format: 52 x 11 minutes

Budget: US\$7.3 million

Status: In pre-production with a bible, pilot and two scripts completed, and a third script and writer's bible being prepped for Kidscreen Summit. International presales are secured with Channel 5's Milkshake! (UK), YLE (Finland), NRK (Norway), SVT (Sweden), Pixel (Ukraine) and BBC (Alba). Distribution is being handled by Red Kite Distribution.

Delivery: Fall/Winter 2014

Hooba Jooba With a strong focus on comedy, this new series is based on a short award-winning student film from Guru Studio's Max Swiecki, a graduate of Toronto's Sheridan College. Inspiration for the film hit Swiecki on a lonely walk home one night, when an image of two 10-year-old hairy pals, Hooba and Jooba, popped into his head. The comedic duo, who live with their Grandma Jenkins and her pet pug Boo Boo, are a destructive but happy force, thanks to the juxtaposition of Jooba's brash, goofy personality with Hooba's obsessive and perfectionist tendencies.

Producer: Guru Studio (Canada)

Style: 2D animation or puppets

Format: 56 x 11 minutes

Budget: US\$370,000 per half hour

Status: Ready trailer and scripts for Kidscreen Summit

Delivery: Spring 2015



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Chub City Based on the toy car property Chub City from Jada Toys, this planned TV series follows the adventures of a group of teenagers who drive customized cars at Chub City rallies and one is eventually recruited to seek and secure a powerful energy force. Stories will focus on spectacle and character, with comedic situations being drawn from the teens' relationships with each other and with the very logical A.N.D.I., a computer program built into their cars. *Chub City*'s show creators, who are vehicle enthusiasts, were inspired by the evolution of car-customization culture, Gymkhana-type cars and races, and the original style and vehicle design of the Chub City toy line. A new toy line based on the series is also in the works.

Co-producers: Fuel Entertainment (US), Dentsu (US) and Nelvana (Canada)

Style: CGI animation

Format: 52 x half hours

Budget: Approximately US\$300,000 per episode

Status: A bible, trailer, pilot script, game design document and a few episode scenarios are available. Currently seeking broadcast and other consumer products partners.

Delivery: Late 2015

boys
5 to 8



Talent hunting

TFOU widens net for discovering young content creators

With the industry's increasing demand for innovative content across platforms, broadcasters are continuing to think outside the box when it comes to finding fresh ideas and new talent. For TF1's kids programming block TFOU, the France-based channel has found success discovering potential creators to nurture through its yearly student challenge, TFOU d'animations.

Launched most years at Annecy International Animated Film Festival, the competition specifically targets schools known for writing and producing visual images. However, the latest TFOU challenge opened submissions to a much wider selection of post-secondary educational institutions around the world.

"In 2013, we opened it to business, management, arts, political science, digital and trans-media-focused schools, because good ideas can come from anywhere," says Yann Labasque, TF1's head of children's programming.

After partnering with Studyka, a global online challenge platform for students, TFOU invited teams of two to three students to create their own 360-degree IP for kids ages four to 10. Submitted projects were allowed to employ multiple formats including animation, games, fiction and magazine-style presentations.

According to Labasque, a record 213 students took part, representing a total of 79 projects from nearly 99 different institutions. On December 19, five finalists pitched their projects to a TF1 jury that announced the winning team—Charlotte Guilledreau and Sébastien Marty from l'Institut de l'Internet et du Multimedia (Paris) and Caroline Lepee from Paris-based LISAA (Arts Appliqués)—in January. The trio now gets to turn its animated transmedia concept, *Cent Peurs* (100 Fears), into a pilot with help from TFOU.

Labasque adds the channel was extremely impressed by the diversity of submissions for the new challenge. "Even if some of the projects didn't provide everything we were looking for, some were interesting, for example, because they had good potential in the mobile space. Now we can possibly contact these people for developing web-only or mobile-only applications," he says. —Jeremy Dickson

Let's play for real!



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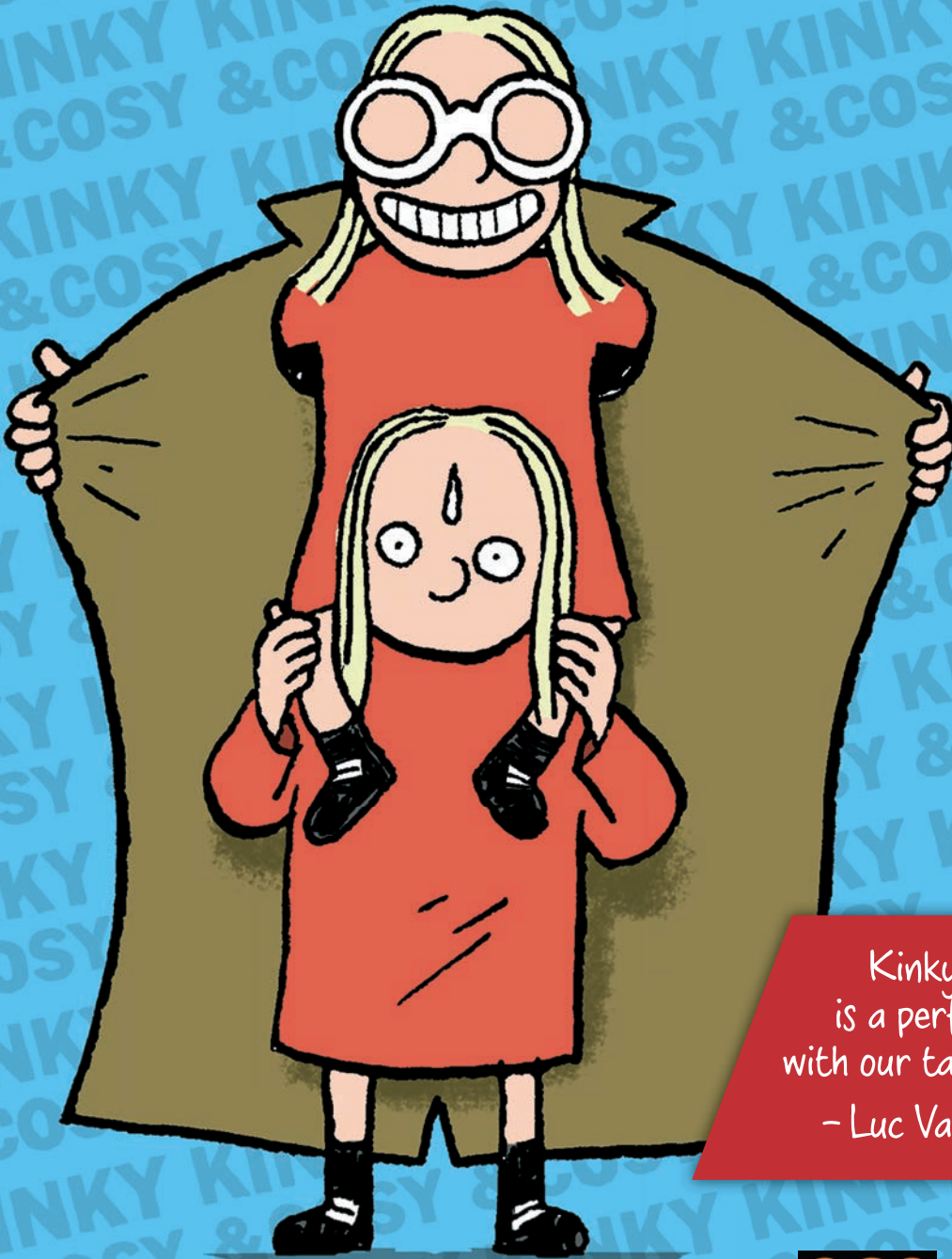
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Q Pootle 5

Snapper Productions ratchets up IP growth for preschool series Q Pootle 5



Good things come to those who wait is a phrase easily applied to UK-based Snapper Productions' first TV series Q Pootle 5. Based on books by bestselling writer and illustrator Nick Butterworth (*Percy the Park Keeper*), the 52 x 11-minute CGI-animated series has been almost six years in the making. But since launching on CBeebies in late July, it has become one of the channel's highest-rated shows for kids four to six. With an additional sale last fall to Australia's ABC4Kids, and an expanding UK licensing program managed by London-based Rocket Licensing, the sky's the limit for this imaginative series set in space.

On-air



Creator-driven Based on the *Q Pootle 5* and *Q Pootle 5 In Space* picture books by Butterworth, the idea for a TV series had initially been presented to the author and his producer son, Ben, by a few prodcos. But the Butterworths held out. In late 2008, they decided to form their own production company, Snapper Productions, to make the show with a planned budget just over US\$8 million.

Although there were obvious fiscal benefits to joining with larger entertainment companies, Ben Butterworth says the family didn't want to give up creative control, and chose the private financing route instead. "It gives us a strong sense of ownership and authorship. We wanted to stay true to both the tone of the books and the visual style," he says, adding that the family's biggest challenge was holding onto the creative reins while looking for money. "We could have gotten the money more easily, but I wouldn't be talking to you right now. We set out to make the show completely in Britain before the tax break because we wanted as much creative control as possible."

While managing the financing, Snapper presented the show's pilot to the BBC in July 2009, before introducing it to Europe and the world at Cartoon Forum later that fall.

Once CBeebies committed, ZDF Enterprises joined in as a distributor in 2010. According to Butterworth, the better part of the next 18 months was spent raising the rest of the budget. The show finally went into production in January 2012.

So far, the hard work has paid off. Since launch, the series has reached more than four million people, meaning one in every five children in the UK has watched the show to date. Attracting viewers across the channel's key demographic groups, *Q Pootle 5* is reaching 39% of all children in the four to six bracket, which represents more than 900,000 viewers. It has also racked up more than 1.2 million views on BBC's iPlayer.

Character strength Butterworth says *Q Pootle 5* is particularly unique in that its aliens aren't threatening. "They are just a fun group of beings, representing the lives of children and how they play and interact with the world," he says. "You need credible, nuanced characters. We didn't want to create character types."

Animated by London-based Blue Zoo, the series follows the everyday adventures of a small green alien, Q Pootle 5, and his friends Oopsy, Eddi, Stella, Groobie and Planet Dave on their home planet of Okidoki. "Our goal was to create little slices of cinema," says Butterworth. "We also wanted it to appeal to a broad audience. The tone of all Nick's work is something parents can appreciate, as well."

Brand expansion To date, the IP has picked up five British licensees—Immediate Media (*CBeebies Weekly*), Egmont (standalone magazines), Jumbo (games, puzzles), VMC (accessories) and Rainbow Productions (costumes). The first batch of products will launch this spring. Snapper has also targeted mom bloggers and the show's social media presence is strong, especially on Facebook. —Jeremy Dickson

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The Rainbow Loom, by Choon's Design, was a surprise holiday hit

Weaving success

With scorching holiday sales, the low-tech **Rainbow Loom** is tapping into girls' social nature to drive an arts & crafts toy category boom

BY GARY RUSAK

With multinational toycos investing millions in developing the latest tablet add-ons, integrated physical-meets-digital doohickeys and robotic pets, it seems a tad bizarre that the runaway hit of the US holiday shopping season was a simple crafting device—but that is exactly the case. “It’s deliciously ironic,” says BMO capital markets analyst Gerriek Johnson. “The most low-tech toy you can imagine is the one that is capturing kids’ imaginations.”

Rainbow Loom was developed in 2010 by Cheong Choon Ng, a former airbag safety engineer for Nissan and now founder of Choon’s Design, the maker of Rainbow Loom. He was definitely onto something, as the homegrown bracelet-making kits were the most sought-after holiday gift in 2013.

According to estimates at press time, more than 3.5 million units of the girl-targeted kits, with price-points ranging between US\$14.99 and US\$16.99, have been sold in the US since their launch. And more than two million of those units flew off retail shelves in the six weeks between American Thanksgiving and Christmas 2013.

The story of its creation is as charming as Rainbow Loom’s success is unlikely. “My daughters were making bracelets from rubber bands that they had for their ponytails,” says Choon. “I saw them trying to do it by hand and I wanted to show them that Dad is cool, too.”

However, making the tiny bracelets proved difficult because of the size of Choon’s hands, so he headed to his basement with a handful of nails and pushpins. There, he developed the first prototype Rainbow Loom. “I was excited, but my kids weren’t,” he says. “But when I added more rows and combined different colors for the bands, they liked it a lot and took it to school.”

The rest, as they say, is history. The simple kit consists of a hook, two plastic template boards, a couple dozen plastic hooks and a bag of multi-colored rubber bands. “The reaction from their friends at school was, ‘Wow, this is so cool,’” says Choon. “Kids who would never talk to me before were all of a sudden asking me for bracelets.”

Crafting sales

Unlike other segments of the toy market, the arts & craft category has enjoyed steady growth over the last couple of years. According to the Toy Industry Association’s own data, in 2011 arts & crafts products rang up US\$974 million in US retail sales. Despite a general downturn in the industry, that number grew 4% in 2012 to US\$1.01 billion. And according to the latest numbers from Port Washington, New York-based The NPD Group, the category experienced the second-highest growth last year, with sales jumping up another 8% (only the youth electronics category made bigger gains at 18%). The steady year-over-year growth has been buoyed by retailers such as craft specialty chain Michaels, which has reported high single-digit comparable store sales growth for Q3 2013 in an otherwise tough retail climate.

“There has been substantial growth for craft kits,” confirms Russ Crupnick, SVP of industry analysis for The NPD Group. He contends the reason for the general category growth (including toy and overall merchandise)—and the success of Rainbow Loom, in particular—is pretty straightforward. “Most parents prefer a peaceful co-existence between tradition and technology,” he says. “They don’t want the kids on a tablet or console 24 hours a day.”

And the category’s traditionally low price-points also don’t hurt. “It’s easier for parents to get on-board when you aren’t talking about a US\$100 item,” says Crupnick. BMO’s Johnson agrees that the low-tech kits are as attractive to parents as they are to kids right now. “It’s a hunk of plastic with pegs,” he says. “Toy companies have been complaining about the rise of digital and apps and tablets for years, and the media has been calling for the demise of low-tech toys, yet [Rainbow Loom] is now incredibly hot.”

A good idea is one thing, but manufacturing a mass-market consumer product is something else. After pricing out US manufacturers, Choon decided that for the US\$10,000 he had to invest in the product, manufacturing in China was the only option. “It cost me US\$5,000 for the tooling of the template and another US\$5,000 for the parts,” he says. “I had spent all of my time designing the artwork for the boxes using Powerpoint and then tried to sell it.”

Initially, retailers were not interested. Choon knew that he needed some kind of marketing tool to show exactly how to use the kits. Enter YouTube. “We put up videos of my daughters demonstrating how to use it,” he says. “They really worked.” (Currently, Rainbow Loom’s YouTube channel has more than 192,000 subscribers and more than five million views.)

The cheap-and-cheerful marketing plan caught the attention of a few franchise owners of the US specialty toy chain Learning Express. And a Learning Express location in



More than two million Rainbow Loom kits flew off US retail shelves in the six weeks between Thanksgiving and Christmas

Georgia was the first to offer in-store demonstrations—that’s when then the orders started pouring in. “I think within two weeks they placed an order for US\$10,000 worth of kits,” says Choon. “We looked at the order screen and couldn’t believe it. We were still assembling them at our kitchen table.”

In short order, through word-of-mouth and viral marketing, big-box stores like Toys ‘R’ Us and Michaels began to place orders and it became necessary for Choon to hire more than a dozen people to help out.

There were even reports that summer camps and school started banning the Rainbow Loom because of its widespread popularity and uncanny ability to monopolize young girls’ attention.

Interestingly, it’s the social aspect of the craft that NPD’s Crupnick believes has boosted its sales. “Younger kids don’t use social media at all,” he says. “The kits are something that kids can do with friends.”

Choon agrees that the social component has propelled the modest kits to the top of many kids’ wish lists.

“It’s a way for kids to get away from the computer,” he says. “It’s social. Kids are sharing the bracelets with their friends and coming up with unique patterns to share.”

Knocking it off?

Of course, a product with Rainbow Loom’s surprise success can look forward to a future plagued by knock-off competitors and increased retail expectations. In response, Choon says that he is creating new innovative Loom products, including travel kits that will likely hit US mass retail in April.

Additionally, he is considering opening the product up to in-bound licensing and says he has already fielded “many calls” from interested parties. While he concedes that the current “craze” phase isn’t likely to last, he believes that the kits will always have a stable place at retail. In the meantime, Choon is simply enjoying the ride. “It’s mind-blowing that something that started in our dining room could be this successful.” **K**

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AWESOME SHOWS



Henson's *The Enchanted Sisters* features siblings Autumn, Winter, Spring and Summer, who usher in the seasons

"Literature and books are great forums to tell longer adventure-quest stories with authenticity."

The series tells the story of four Sparkles (Autumn, Winter, Spring and Summer) who, along with Mother Nature, are responsible for turning the seasons and keeping nature in perfect balance. Adventure, friendship and wonder will all be mined for maximum effect throughout the series, according to Stanford.

The first book tells the story of a gift that Autumn receives from Mother Nature, which she proceeds to lose. She then enlists her siblings to help find it again.

The initial title was written by New York Times bestselling author Elise Allen, with character design by Paige Pooler, known for her work for Disney, Nickelodeon and Scholastic.

Stanford says the illustrations and the story will set the series apart from other girl-oriented fantasy products on the market. "It's 2D and traditional illustrations, but with very colorful and adorable details," she says. "The details of the world are as if a nine-year-old girl imagined Tolkien's Middle Earth."

While the books are being prepared for publication, Henson is already looking to take its new IP into the TV realm and eventually to a fully realized licensing and merchandising program. "You can imagine the TV series," says Stanford. "It would be a female-led adventure. We can see how popular something like *Hunger Games* or *Frozen* is—the adventure aspect of it would lend itself well to TV."

Appropriately, the entire creative team behind the new series is comprised of women. "We are all actually the enchanted sisters," laughs Stanford. "Girl power isn't something new for us—it's something Henson has been doing for years." —Gary Rusak

'Tis the Season

Henson launches publishing imprint built around new girls adventure-fantasy IP

The Jim Henson Company is launching a new publishing imprint this fall, leading with a series of seasonally oriented adventure books aimed at a core girls demo. In partnership with publisher Bloomsbury Children's Books, Jim Henson Publishing will launch the *Enchanted Sisters* series this August with *Autumn's Secret Gift*, the first of four books that will each be released at the start of a new season.

"We have a rich history of creating deep fantasy worlds," says Halle Stanford, EVP of children's entertainment at Henson.

Beanstalk sprouts digital branch Tinderbox

The proliferation of digital properties in the marketplace has necessitated a new approach to licensing and merchandising, according to Dan Amos, head of new media at Tinderbox, a division of UK-based licensing agency Beanstalk Group. "The way entertainment is being delivered to kids is changing, and I wanted to find a way to speak directly to those types of brands," he says.

Last year, Amos helped develop the new bespoke division of Beanstalk to concentrate on the emerging business area. The division's mandate is to manage brands originating in the digital space, taking a customized and curated approach. Additionally, one of the division's core tenets is to see brands "at the earliest possible stage," so the group can help with the overall development of a property.

"I think it's a disservice to call [digital properties] a trend," says Amos. "We aren't turning off the internet next week and throwing all of our phones into a fire. This technology is how kids are going to interact and communicate with brands."

In its first year, Tinderbox has inked a handful of global clients including MovieStarPlanet (a social network for

kids eight to 13 that currently has more than 150 million global user profiles), world-building music game *My Singing Monster* and Canadian-developed mobile game *The Beetnuks*.

Amos says that the division's focus on digital brands, and the gaming space in particular, allows it to understand certain aspects of a licensing program that a traditional approach might overlook. For example, Tinderbox helped put together a deal with UK-based publisher Egmont for MovieStarPlanet that included a monthly print issue that comes with a virtual gift that can be redeemed on the social network's site.

Paradoxically, Amos says that publishing has taken on major importance as a licensing category for brands in the digital space. "It's a natural extension and it helps legitimize the entertainment in the eyes of parents," he says. "Publishing just seems to get it at the moment." Currently, Tinderbox is in expansion mode, with the aim of doubling its client roster by the time its official first anniversary rolls around in June. —Gary Rusak



Digital IP division Tinderbox is working with new mobile game *The Beetnuks*

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A snug fit

Morphsuits makes a shape-hugging licensing play

Who Edinburgh, Scotland-based Morphsuits was formed in 2009 with one product in mind—the full-length spandex suit. “Three good friends from Edinburgh University went out one night; one of them dressed up in a spandex suit and received a hero’s welcome wherever they went,” says Tom Barber-Fleming, brand manager of Morphsuits. “That was the lightbulb moment—far from your standard startup story.”

What The business started by focusing on two different demos that might be interested in wearing spandex from head to toe. “You can see through it, breathe through it and drink through it, which was good for our standard demographic at the time,” says Barber-Fleming. “We marketed it to 16- to 24-year-olds, who were coming into their own, and to a younger professional crowd, living for the weekend. They were going out to sporting events and stuff like that.”

In the first year, Morphsuits sold 50,000 units and the suits quickly became an instantly recognizable part of the party scene. However, when the company acquired the license to create Power Rangers-branded morphsuits, things changed rapidly. “Very quickly, the Power Rangers suits made up more than 20% of our online sales,” says Barber-Fleming. The licensed suits retail for between US\$34.95 and US\$64.95. And now, the company’s eyes are wide open to the potential of licensing.

Latest Innovation With the success of the Power Rangers line, it made perfect sense for the company to secure the UK and European license for the Marvel universe. In preparation for the arrival of Spider-Man and Co., the company expanded from its spandex beginnings and launched the Morph Costume Company in September, increasing distribution to include specialty stores and costume shops, as well as its online store.

What’s Next Additionally, its acquisition of apparel technology company Digital Dudzs last year opened the door for Morphsuits to create digital apparel that utilizes augmented-reality technology and smartphone apps. Currently, its Marvel license allows the company to integrate the new technology with some of the world’s best-known superhero IPs. After downloading the Morphsuits app, if you place a smartphone up to the arm on a Wolverine costume, for example, the arm on the smartphone’s screen will then appear to grow animated claws. Currently, Morphsuits has “a few irons in the fire” in terms of new licenses, but it is always looking to add to its roster.

Contact Gregor Lawson, founder and marketing director of Morphsuits (gregor@morphsuits.co.uk, 44-131-556-4230)

—Gary Rusak

Superhero IPs like Spidey are a perfect fit for the full-body spandex suits that have been a hit with the young adult crowd in Europe



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Globetrotting

Genius Brands introduces Chile's Pascualina to the world

Genius Brands International looked to Latin America to find its newest IP, Pascualina. A popular tween girl property for more than 20 years, the Chilean-born brand focuses on its titular character as a fashionable, relatable world traveller, with an uncommon sense of style and flair.

"I was really struck by how beautifully designed and cosmopolitan it is," says Amy Moynihan Heyward, president of Genius Brands International. The company is comprised of the recently merged assets of A Squared Entertainment and Genius Brands International. Along with Pascualina, Genius is currently producing the animated film *Stan Lee's Mighty 7*, and introducing a new subscription streaming service for its Baby Genius property.

While Pascualina is one of the most popular characters in Latin America, up until now she has been chiefly contained in millions of agendas that are sold throughout the continent. The product can best be described as part diary, part graphic novel and part scrapbook, filled with a mishmash of designs, colors, textures and story fragments.

"The back-story is that her father is an astronomer and she is growing up and coming of age while moving all around the world," says Heyward. "It's aspirational and filled with lots of positive messages—there are not a lot of great role models out there for girls, and this is one."

The positivity of its message is a good fit with Genius Brands' stated goal to produce "content with a purpose" and falls in line with its portfolio that includes the series *Secret Millionaire's Club* (created by Warren Buffet) and the science-based *Thomas Edison's Secret Lab*.

The first order of business, according to Heyward, is to introduce the character to North America, leading with publishing and following up with other goods like accessories and fashion items. She envisions starting a specialty-tier retail program in the US.

Outside of the US, Genius is looking for agents to develop the Pascualina program for specific territories.

TF1 Licenses has already signed on to rep the brand in France and launch a program led by publishing and social expressions with a musical component.

—Gary Rusak

Doodle Jump springs into US retail

It could be a big year for Lima Sky's *Doodle Jump*. After a consistent run near the top of the paid iOS apps list, the coming months will be the first true test of whether or not that digital success translates into sales of consumer products. "We are anticipating that it will have a collectibility aspect that no other app brand has," says Eric Karp, chief licensing officer of New York-based Lima Sky. "It has all the right ingredients to be a break-out."

Karp says that the nature of the app's main character lends itself to a wide demographic and countless incarnations that will serve to make Doodle as ubiquitous on retail shelves as it currently is on mobile devices. "Doodle is a blank canvas that you can add any theme to," he says. "We see it as a modern-day Pac-Man."

Master toy partner Goldie Marketing is readying toys for late spring shipments in the US, while Innovation First, the maker of Hexbug, has signed on to create robotic toys, and Egmont is on-board as a publishing partner. As further evidence of the anticipated windfall, for the first time in its history, Japan's Sega will rep a third-party property. It has agreed to exclusively handle marketing and licensing for *Doodle Jump* in Japan.

To coincide with the toys hitting retail, Lima Sky is continuing to develop innovative partnerships with other brands to create further exposure for its main character, like its first co-branded deal in 2011 with Universal Pictures' feature film *Hop*.

"That was the very first crossover," says Karp. "It was successful and made sense from a brand collaboration standpoint. However, there were some lessons that we learned." The take-away, he says, is that any brand collaboration can also serve to limit the audience of an IP. "That's why this year our crossovers will hit three different demographics."

While it's too early to announce, Karp says there are three specific deals in place to create branded *Doodle Jump* games that will include other iconic IPs. "There is now no chance of us taking our wide audience and squashing it down to a smaller segment," he says. "No matter how strong the other brand is, you run a slight risk of becoming associated with its primary audience instead of your own."

—Gary Rusak



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Making merch moves

The Next Step gets set to trip the light fantastic at retail

Launching a consumer products program for a live-action tween series can be tricky, but Toronto, Canada's Temple Street Productions is hoping that its latest series has what it takes to dance into retailers later this year.

The Next Step is a "scripted reality series" that follows a group of students at The Next Step Dance Studio as they compete in a tournament and face the everyday foibles of growing up. "It's loosely scripted, with some improv, and it touches upon a lot of things that are in the zeitgeist right now, like dance and competition," notes John Young, MD of Temple Street Productions.

The series bowed on Family Channel in Canada last March and quickly became the country's top-rated series across all specialty channels. It also took home Canada's kid-selected 2013 Shaw Rocket Prize for Best Children's Program, and even spawned a successful cross-country shopping mall tour. And last month, distributor BBC Worldwide sewed up a number of deals to bring the series to Hulu (US), CBBC (UK), Disney Channel (Australia) and Sky Italia (Italy).

Now it's time to see if the series has legs in consumer products. With assistance from Toronto-based WexWorks Media, Temple Street inked a deal with Segal Licensing, also in Toronto, to develop a program specifically for the Canadian market.

"To be honest, at first I looked at it a bit warily," says Stuart Pollock, president of Segal Licensing. "But then I just fell in love with the show itself. Looking at the ratings and the mall tour, it's just a real phenomenon across Canada."

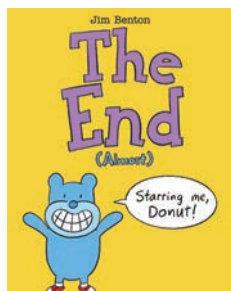
Pollock says the affinity tweens have for the series, and for its specific stars, is a good indication that a targeted licensing program can work. He's earmarked apparel and back-to-school categories to lead the program, and hopes to get those goods into Canadian mass and mid-tier retail in August. The second wave will include other lifestyle products that are tied to exercise and dance like footwear, as well as publishing.



Tween-targeted *The Next Step*'s popular cast makes the IP ripe for FMCG and promo opps

"At some point, we will want to look at consumer packaged goods and promotional possibilities, too," says Pollock. "The cast members are charismatic, and I could definitely see endorsements as part of it."

As for the pitfalls that can sometimes beset a tween live-action IP, Pollock says he isn't worried about the stars of *The Next Step* becoming fodder for tabloid gossip and TMZ. "It's not *Hannah Montana*," he says. "It's not focusing on one person. It's an ensemble cast, and it's really about how good the show is and how well it connects with the audience." —Gary Rusak



BookBet Jim Benton's The End (Almost)

Long-time *Kidscreen* contributor and New York Times bestselling author Jim Benton, the man behind the Dear Dumb Diary series, is back with a new picture book for kids three to five. *The End (Almost)* follows the off-the-wall adventures of Donut the bear. You see, the titular character just doesn't want this story to end. And the creative bear will go to great lengths, including donning hilariously elaborate disguises, to make sure that the tale continues. Priced at US\$16.99, the 40-page picture book published by Scholastic Press will be available at North American mass retailers on February 25, marking the beginning of *The End*. —Gary Rusak

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TV on their time

BY MELANIE SHREFFLER, TRENDS & INSIGHTS GURU

As this generation grows up never having to wait to watch their favorite shows, new research from Smarty Pants delves into the impact of Netflix, YouTube and Hulu on children's viewing habits

With on-demand, streaming subscription sites and apps, kids can now find the shows they want whenever they want them. Couple that with the fact many kids prefer watching “TV” on tablets rather than on a traditional television set and it could spell trouble for the networks currently serving kids. According to recent research from Smarty Pants, services such as Netflix, YouTube and Hulu in the US are now competing on equal footing with kids television networks—and winning.

In the brand-new *TV Network Report*, Smarty Pants notes YouTube is the second-highest rated “network” in terms of Kidfinity™—a proprietary measure of kids’ brand awareness, popularity and love for a brand—falling just behind Nickelodeon and surpassing Disney Channel. Meanwhile, Netflix is the second-fastest growing “network,” and ranks just two Kidfinity points behind Cartoon Network.

One reason these network alternatives are faring so well in the youth market is because kids see no difference between surfing channels on TV or surfing for content on a streaming site. As long as they find an entertaining show or video, they’re happy.







Not only do streaming services deliver fun video content, kids also say they’re easy to use, convenient, portable and always offer something new. And those are features with which established networks have yet to figure out how to compete. Although every network has a website and many have apps that allow for on-the-go viewing, according to new research, streaming services rate far more highly on these key drivers of Kidfinity.

Another major factor at play in kids’ perceptions of their viewing options is that networks tend to limit the video content available on their websites and apps, while streaming services don’t. In a world where access is no longer a barrier, it’s content—the quality, amount and variety—that sets streaming services apart. From a kid’s point of view, Netflix and YouTube are one-stop shops for all their video needs.

YouTube enables discovery

YouTube is often kids’ first stop for streaming video. Kids have come to trust that they’ll always find something fun and interesting – not only does it have cool and silly videos featuring kids just like them, it also has clips and episodes of their favorite shows and music videos from their favorite

Percentage of kids who say attribute describes the network, 2013

						
Kidfinity Score	858	814	661	875	849	816
Cool	56%	49%	31%	48%	48%	47%
For Kids My Age	56%	55%	42%	76%	67%	71%
Fun	54%	46%	30%	60%	62%	55%
Offers Variety	39%	45%	22%	32%	35%	29%

© Smarty Pants, Young Love 2013

artists. The site holds endless possibilities because there is always something new to discover and explore.

YouTube is especially popular with older kids. As they enter their tween years and develop stronger personal interests, they want to explore those interests and broaden their worlds. YouTube offers the ideal venue. In their eyes, the site has a little bit of everything, from design ideas for their Rainbow Loom, to how-to sports videos for emerging athletes. It even offers homework help. Of equal importance to tweens, who are just beginning to deal with social pressures, it provides the opportunity to discover the next hot video and be the first to tell their friends about it.

As with Netflix, YouTube's longish history adds to its awareness among kids and moms, but it's had to repair its reputation to win over families. Moms might have once been concerned about what their children would find on YouTube. However, they have stopped worrying and come to realize the site's value as an educational and inspirational tool for their children. In fact, YouTube has been growing rapidly in Momfinity, rising nearly 100 points to become moms' second-favorite video brand. The number of moms who let their kids access YouTube has more than doubled in the past four years.

Netflix and the "I Want It Now" factor

Netflix sates kids' desires for instant access to the programs they want to watch. The once movie-based service has gathered a broad range of kids programming, including content from Disney Channel and Cartoon Network, as well as niche shows and original series, all in one place that's easily accessible. In short, kids know they can always find shows they like.

Netflix draws in viewers through deals with networks for well-known shows, but once in the door, kid viewers are

delighted to discover a wealth of content. Nearly half of kids (45%) say the brand offers "great variety and choice" and the same proportion says it "always has new things," far surpassing linear networks on both counts.

Netflix's Kidfinity is particularly strong with young kids six to eight. At that age, kids are less concerned about having the latest episode of shows—a common complaint among adult Netflix users. They're content knowing they can always find a few episodes of their favorite shows to watch (over and over again). Moreover, they can tell that Netflix cares about them because it offers the Just For Kids section. There they can control their own viewing—a key selling point for this demo, which is delighted with each step it takes toward independence.

Netflix's other key advantage is that it's the longest-running network alternative. Not only did Netflix infiltrate family viewing in the late '90s with its DVD service, its "Watch Instantly" service launched way back in 1999. Through free trials, advertising and pre-loaded app deals, Netflix's awareness among US moms (94%) and kids (84%) is as strong as that of the major networks. In addition, moms are familiar and comfortable with the service and what it offers, because they are users themselves. They feel confident allowing their children to peruse Netflix regularly, knowing they won't be barraged by ads or accidentally incur extra charges.

Hulu's hits and misses

Not all streaming services are created equal. While Hulu has steadily grown in popularity among adults, it has yet to crack the kids market. It treats kids as a secondary audience while concentrating on pleasing older viewers. Hulu's primary selling point—that it offers the latest episodes of shows before other streaming services—doesn't



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YouTube, Netflix and Hulu awareness among kids & moms

Kids



90%



84%



50%

Moms



99%



94%



71%

© Smarty Pants, Young Love 2013

resonate with kids, whose favorite TV shows rarely end with cliff hangers or suspense. An episode they've seen 100 times is as satisfying to watch as the most recent one.

Still, Hulu has a devoted children's section as part of its Hulu Plus service, but it pales in comparison to Netflix. It's lacking the key ingredient for success—the shows kids want to watch. Until it expands its offerings, it will continue to be a distant third to YouTube and Netflix, and not much of a threat to linear networks.

Hulu's main appeal is with moms, who have significantly greater awareness and affinity for the service than do their children. But that could all change. As with Netflix, moms are becoming more comfortable and familiar with the service and could pass their affinity on to their children—if Hulu is able to expand its kids programming.

Streaming services are here to stay

YouTube, Netflix and to a lesser extent Hulu, have become part of families' routines. In the car, at grandma's house, in the grocery checkout line, at bedtime, streaming video services fit parents' and kids' always-on lifestyles.

They delight the whole family for a variety of reasons, whether it be bringing the group together to enjoy a movie night with Netflix, or solving a homework problem together with a little help from YouTube.

The new "network"

The success of streaming services is bittersweet news for traditional networks. Streaming sites and apps can be strong distribution partners, but they are also stealing viewers' time and brand affinity. Streaming services may owe their popularity in part to traditional TV networks as content partners, but it's their ability to meet the lifestyle needs of kids and families that has allowed them to compete directly with networks.

Where streaming services lag—and kidnets have an opportunity to gain some more ground—is that they're not specifically made with kids in mind. Netflix, Hulu and YouTube all launched as services marketed to adults and rank far lower than traditional kids networks in being "for kids my age," which correlates strongly to kids' brand affinity. Streaming services also lag behind the Big Three networks—Nickelodeon, Disney Channel and Cartoon Network—in the fun factor, another primary predictor for entertainment brands.

Streaming services may have found a formula for pleasing kids—giving them what they want to watch, when they want to watch, and on the devices they want to watch—but they haven't cornered the market. **K**

The *TV Network Report* is based on findings from Smarty Pants' annual *Young Love*® study. This ground-breaking study—now in its fifth year—identifies the brands that capture kids' and moms' hearts, time, viewing and purchase power. The 2013 edition surveyed more than 6,700 US kids ages six to 12 and their parents, evaluating more than 250 brands across 20 categories. The full *TV Network Report* and *Young Love* study are available from Tennessee-based youth and family research firm Smarty Pants (asksmartypants.com). Contact Meredith Franck (mfranck@asksmartypants.com or 914-939-1897) for more information.



Keeping tabs on traditional networks

As the Big Three US kids networks compete for dominance, according to Smarty Pants' annual Kidfinity rankings, they have been trading audiences. As their lineups shift, so do kids' interest in them. Cartoon Network, for example, had been boys' favorite, but as girls co-opt shows on the channel, boys are migrating to Nick, whose lineup now includes more boy-centric cartoons such as *Sanjay and Craig* and fewer girl-focused live-action shows. For its part, Disney Channel has also seen an increase in boy affinity with the addition of quirky cartoons that broach tween topics. And despite offering similar content to the Big Three, Hub Network lags behind primarily due to kid awareness.

As they vie for power, the dominance of Nick, Disney and CN may be at risk. Not only are they under fire from streaming services, but also adult networks are growing in kid appeal. Having been introduced to more "grown-up" channels through co-viewing with their parents, kids' affinity for the likes of ESPN is thriving. In fact, the Disney-owned sports channel is the fastest-growing network among kids. What's more, girls are the key drivers of this trend as they bend gender lines and take a stronger interest in sports and science, also boosting Kidfinity levels for Discovery Channel and Animal Planet.

Meanwhile, in the battle of the network spinoffs, both NickToons and Disney XD have their sights set on shoring up the six to eight set. NickToons won the battle this year, posting an increase in Kidfinity equal to Disney XD's decrease. Likewise, ABC Family continues to rule the tween girl audience, thanks in part to strong approval from their moms, who have become fans of the channel themselves.

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What friends are for

Nick takes a closer look at what friendship means to kids today

BY ERIN MILLER

As we settle into the new year, Nickelodeon stays committed, now more than ever, to understanding the changing dynamic of kids today. We feel we've come to know millennials as a thriving cohort, solidifying their place in society. What about their successors? The post-millennials, in subscribing to the Howe/Strauss theory, are defined as being born in 2005 and they make up 70% of two- to 11-year-olds in the US. This group has been Nickelodeon's sweet spot since our inception, and we've made it a priority to understand post-millennials' minds, their behaviors and their world. In the first Kaleidoscope article of 2014, we're hanging out in kids' social circles to better understand what friendship looks like and means to them in today's world.

Friendship is a timeless theme of childhood, but each generation has a unique perspective on it. To begin, friendships among kids are more transient than they once were. It used to be common to have the same group of friends throughout the elementary and middle-school years. Today, kids are more likely to not have the same school friends from one year to the next. When it comes to making friends, kids find this generally easy, with 36% of kids saying they find it "very easy" to make friends, although they may not stick with these particular friends through the years.

Just as friendship is becoming more transient, circles of friendship are also shifting. Three key areas of friendship that Nick is monitoring include kids' inner, outer and social circles. When looking at a kid's social circle, it can't be denied that this is an ever-increasing and limitless world, thanks, in particular, to social media. The likelihood that kids may never meet some of their social media friends is very real, and their connection to them is weak. Interestingly, the behavior lends to the collection of friends, where kids use the number of their social friends as a bragging point among peers. The outer circle of friends is a group of real people kids actually know, but unlike the social circle, the outer one is decreasing in numbers. These friends are most likely classmates or teammates, and though kids know them, they don't know everything about them.

Compared to the social circle, friends in the outer circle are considered real friends. Finally, the inner circle of friends is filled only with the friends that are most trusted and considered best friends. On average, kids have three best friends, but they are different because there's a chance they may not know one another. Because kids are highly involved in a number of activities at any given time, it's likely they have a best friend in their different worlds. For example, a kid can have one best friend at school, one family best friend and another from a sports team. All of them can be considered best friends, but they may not know each other.

Another noticeable shift in friendship among today's kids is seen in peer acceptance. The criteria for who your friends are, and who fits in where, look different from other generations. More important today is how good a friend you are, which has increased in importance from 39% 10 years ago, to 47% in 2013. Smart and funny are important factors in determining not only a sense of self, but also the friends kids seek out. In fact, how funny your friends are is more important to kids than the types of clothes they wear and the kind of music they like to listen to. It isn't that music is less important than it used to be, but rather that a certain kind of music no longer defines a kid or who a kid is friends with.

The real message today's kids are sending is that fitting in is less important than being different; a striking contrast to millennials. **k**

This concludes part one of our study on friendship. Next month's Kaleidoscope will continue to explore the role of friendship in kids' lives.

For more information, contact Kaleidoscope@nick.com

(Source: Nickelodeon Group Consumer Insights Research, "The Story of Me," January 2013)

A major focus of the Brand and Consumer Insights Department at Nickelodeon Kids & Family is to live and breathe kid culture. We continually track and identify trends, and explore what it means to be a kid and teen today. In an effort to keep you in touch with our audience and give a voice to our consumer, we've created the Nickelodeon Kaleidoscope. Every month, Kaleidoscope will capture key areas of interest across the kid and family cultural landscape, provide an understanding of attitudes and behaviors, and report on trends and buzz.



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Krakatoa
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Muse of the Month

The exciting adventures of Noémie and family

This three-year-old's family-centered life is a gateway to healthy friendships



Nestled in a small town on the border of France and Switzerland lives the very adventurous three-year-old Noémie. Outside of her preschool musings of finger painting and circle time, she is often hiking or cycling the back trails of Switzerland, skiing the French Alps, or swimming in the Bay of Biscay. “When there’s no snow, I like to ride fast behind my daddy’s bike in the trailer. But if there’s snow, I like to go skiing with my uncles and sledding with my mommy.”

While Noémie’s experiences may be more adventurous (and picturesque!) than those of other kids, she does have one thing in common with her preschool peers—a life centered around family. Family, above friends, are her preferred companions and playmates. She even chooses her favorite toy based on how well it forges a family connection. She exclaims, “I like to play with my tea set most because I drink tea with grandma.” This is because Noémie has yet to experience the “Hello, World!” milestone—a central developmental tipping point where children first learn to appreciate relationships formed with individuals in the bigger world, including the opportunity for friendships.

So often in research, we see preschool media centered around friends, but kids will turn to us and say, “Where’s the mommy?” To this end, media creators have the opportunity to help preschoolers develop appropriate social development skills by providing content about the relationships they know best, family. By modeling healthy relationship development, preschoolers learn to navigate from family-centered relationships to budding peer friendships. Even familiar relationships can be exciting adventures.

—Amanda Rosenberg



Insight Kids is a research and strategic consulting company dedicated to catalyzing our clients to build innovative, impactful and inspiring experiences for kids and families. To be further inspired by Noémie and Insight Kids, visit www.insightstrategygroup.com/insightkids/.

Cool or Not? The video streaming service edition

	Boys 8 to 11 (157)	Girls 8 to 11 (149)	Boys 12 to 15 (204)	Girls 12 to 15 (211)		Boys 8 to 11 (242)	Girls 8 to 11 (243)	Boys 12 to 15 (254)	Girls 12 to 15 (264)
	35.7%	24.2%	32.4%	25.1%	Totally way cool *	57.9%	60.1%	53.1%	58.0%
	17.2%	22.1%	18.1%	20.9%	Very cool *	14.5%	14.4%	21.7%	21.2%
	20.4%	26.8%	24.0%	28.0%	Kinda cool *	16.9%	15.6%	15.4%	13.3%
	10.2%	9.4%	10.8%	12.3%	Not cool *	2.9%	4.9%	2.4%	3.8%
	16.6%	17.4%	14.7%	13.7%	Totally un-cool *	7.9%	4.9%	7.5%	3.8%
	39.8%	42%	21.5%	19.8%	Don't know what it is	6.9%	6.5%	2.3%	1.5%

hulu

Hulu

NETFLIX

Netflix

* Excludes “Don’t know what it is” responses



Cool or Not? is part of KidSay’s September/October 2013 Trend Tracker. These one-of-a-kind research reports are published 10 times a year and provide a quantitative and qualitative picture of kids’ likes, dislikes and trends gathered through in-school surveys with US kids ages five to 15. Contact Bob Reynolds (913-390-8110 or bob@kidsay.com).



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Toddler app
Peekaboo Barn is
showing off a fresh
face as it heads into
its fifth year

Betting the barn

Over the past five years, bestselling toddler app ***Peekaboo Barn*** has had a front-row seat to the ups and downs of the children's mobile market, and now brand owner Night & Day Studios offers a clear view of where things are headed in 2014

BY WENDY
GOLDMAN GETZLER

When Portland, Oregon-based Night & Day Studios released one of the first toddler-focused apps on Christmas Eve 2008, the iPhone was trailing behind Nokia and Blackberry in sales. And with its \$US600 price tag, the seeds of parental smartphone pass-back had yet to be sown.

Fast forward to 2014. The US\$1.99 *Peekaboo Barn* app has been downloaded more than a million times—and played 70 times that amount—all while more than 930 apps are submitted to Apple for review and entry to the App Store every single day. So, how does a five-year-old digital brand stay relevant in this ever-shifting climate? The answer, according to Night & Day founder and CEO Nat Sims, may rest beyond the screen.

"We have done licensing in one direction, where we have licensed characters from the book world and made apps based on them, and now we are reversing the flow,"

says Sims. (He originally created the simple cause-and-effect animated barn game for his 18-month-old daughter.) "At first, it was tricky to build *Peekaboo Barn* with no brand recognition, but because we were so early, we had relatively no competition. And now we are ready to take the leap off the screen and onto the page."

Aside from the app itself being enhanced with new animation and sounds, this year will see the popular Peekaboo characters star in their first licensing program, which will kick off with board books based on a suite of four titles. "What I like about a board book is that you can put away devices and engage differently with our characters," says Sims, adding that this app series is one of the first original toddler mobile IPs to move into licensed products.


The studio will also be looking to up its game with older audiences through the release of new original apps this spring, which will eventually be turned into age-appropriate physical books. The franchise of seven branded Peekaboo apps—which include a fridge, forest and Sesame Street version, among others—will also be turned into books. (Night & Day currently has 100 apps in the Apple App Store, 65 on Amazon, and five at Google Play.)

"I think it's a positive change in the industry," says Sims of the gradual move among independent developers

into the physical licensing world. “The effort to take a character and story from a physical book and shoehorn it into an app is a gamble. With *Peekaboo Barn*, these characters have already been designed to be interactive, and there is life outside digital, so the app is almost like a starting point. That’s a change in the industry over the last five years—more brands being launched app-first.”

Of course, the notion of a mobile property setting foot into the licensing world is not a novel one. Angry Birds, for one, sold US\$6.8 million worth of toys in the first seven months of 2012 across the UK, France, Germany, Italy and Spain. And that figure for the same seven-month period in 2013 nearly doubled to US\$13.1 million. Brand owner Rovio’s Angry Birds Star Wars collaboration was named by research firm The NPD Group as the best new toy license in major European toy markets this year.

But unlike apps like *Angry Birds*, *Peekaboo Barn* targets the youngest of mobile users, something that Sims says has presented its share of challenges when it comes to balancing design and marketing.

“We play in a weird world where we sell to parents but the user is the child,” he says. “Success is when parents will pay and kids like to play. You need to be clear on advantages for parents, and if you get into Apple’s Top 25 list, you will stay there for a long time, because people trust that.” 

2014 at a glance

Night & Day CEO Nat Sims tells *Kidscreen* how the kids app space is shaping up for the New Year

Get ready for continued platform fragmentation. More tablets are being launched all the time, and they’re all competing with Apple. The market will continue to split, which increases costs for developers and especially for guys smaller than us. The bigger companies, such as Disney and Nickelodeon that have the resources to develop cross-platform, will have an advantage. But it will be interesting to see exactly what happens content-wise on these new platforms.

The living room will be more interesting. Apple will likely allow play on Apple TV, and at that point, apps will invade the living room—and that’s something in which we are very interested. The potential for play on more than just small screens will be so much bigger—literally.

Licensed apps will get better. Earlier in the licensing game, we were just taking big brands and putting them in the hands of small companies. Brand managers now have more control, and apps will be more coordinated and unified with their corresponding books, movies and toys. Big media companies will continue to hire small developers, but they will be more inclined to keep a lot in-house and publish the apps themselves.

TechWatch Keeping an eye on the gadget scene

Spy Kids



What it is

Among the tech making waves at last month’s Consumer Electronics Show was the Kurio Kids Phone from France-based KD Interactive and LF Products-owned Techno Source. The parent-driven, Android-powered smartphone is packed with unprecedented security features, as well as pre-loaded licensed content.

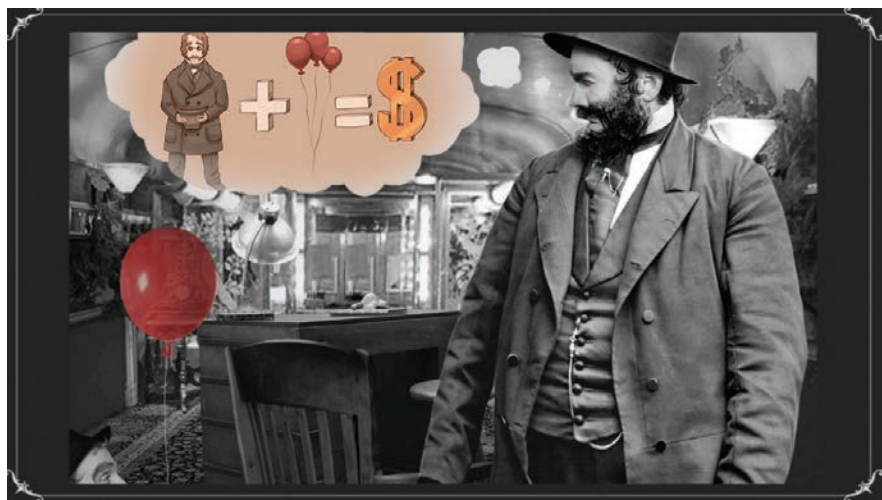
How it works

Parents can restrict app access, data usage, website visits and with whom kids can chat. The Kurio Genius web filtering system, which is already present in the popular Kurio Touch Android handheld, will be put to work on the phone spanning more than 450 million websites with daily auto-updates. The device also provides location notifications in the event that a child leaves a specified area.

What it means

Parents will likely be coveting the covertness of the Kurio when it hits the market this spring. Despite its novelty in terms of advanced features, the phone is joining a steadily growing market of child-proofed tech that will likely lead to kids receiving their first phones at increasingly younger ages.

—Wendy Goldman Getzler



New Kid in Town

Joining the circus

With zero background in mobile development, contortionist Irina Vaganova—through her company Dolce Vita Games—has thrown her hat into the ever-expanding children's app race

Something new As a trained contortionist, Irina Vaganova knows a thing or two about having to be flexible. So when an unfortunate circus accident left her with a broken neck, she set her sights on bringing her passion for the circus to the children's app world, despite having no knowledge of the mobile terrain and its development process. But what Vaganova quickly discovered—as did the duo behind smash app *Cut the Rope*, which was originally conceived in their parents' basement—is that it is easier than ever to build and launch a casual gaming app.

Passion project “More than anything else, I love to play games. So I came up with the idea of *Circus Life* and made a prototype of the game that consisted of several mini-games designed for kids and casual gamers,” says Vaganova, who is now the founder and CEO of Rome-based development studio Dolce Vita Games. *Circus Life*, which launched in December on iOS, Android and Amazon devices, follows a Depression-era man who becomes a star in the circus, and the mini-games center around tasks—drawn from Vaganova's own circus career—that he must perform in order to succeed. At the moment, Vaganova's company consists of herself and several out-sourced contractors that handle all programming, artistic and musical elements of Dolce Vita's apps. She says the notion of relying on one mobile company to see her idea through to fruition seemed unnecessary, given the number of independent contractors that are looking to build their resumés with small projects. “You'd be surprised at how many online forums exist that are full of people searching for jobs,” she says.

Next moves Perhaps the process of seeing the app through to development was surprisingly simple, but marketing a children's app—when there are currently more than 940,000 active apps across all categories in the Apple App Store—is one of the most complex tricks of the trade. Vaganova has invested in a PR and marketing campaign, and she believes her background alone and circus-inspired business sense makes the app stand out from its competitors. “The circus is all about capturing the imagination of the audience at the beginning of the show and building up to a crescendo of excitement for the grand finale. I see games somewhat similarly,” she says. “My story is unique, but I'm also a normal person making games. It's not easy going up against the big companies, and I know it's common to have many missteps before successes.” Her plan is to tip the odds in her favor by working on two more mobile games that also target the children's market, which will launch in the coming months. —Wendy Goldman Getzler

The Digits

Numbers that speak volumes about kids and technology



Kids ages two to 11 are clocking close to

25 hours

a week watching traditional TV, nearly 2.5 hours using a videogame console and 22 minutes accessing the internet via computers

(Nielsen)

Videogame software sales dropped

17%

this past December to US\$1.3 billion—maybe it's because new game releases were down 27% in 2013

(The NPD Group)



At 27%, more than a quarter of British kids under the age of eight have

tablets

and 36% of British parents expect to **spend more** on children's tech in 2014

(USwitch)

The proliferation of smartphones and tablets across Asia/Pacific (excluding Japan) led to a


10%

decline in the PC market in 2013

(IDC)



Toys 'R' Us
your future is now



With debt hovering and sales dropping, the toy retailing institution is on shaky ground. Industry analysts agree it's time for a TRU makeover.

BY GARY RUSAK

TOY FAIR

In the run-up to Christmas 2013, Wayne, New Jersey-based Toys 'R' Us, made a massive effort to extend its shopping hours—even opening up on Thanksgiving Day—to squeeze the most out of a period that has traditionally buoyed the toy retailer for the entire year. Making approximately 40% of its annual sales in the six weeks before December 25, the time period is always crucial to TRU. However, with a long-rumored IPO still on hold and its bond ratings in flux, many in the industry stopped just short of referring to this past shopping season as “make or break” for the 65-year-old toy retailing institution.

The stark assessment is not surprising given that TRU's financial position continues to be tenuous. Nine years after venture capital firms KKR & Co., Bain Capital and Vornado Realty Trust took over the retailer in a US\$6.6-billion leveraged buyout, the retailer, by many accounts, is staring into an uncertain future. According to published reports, approximately US\$1 billion of TRU's debt will come due on September 1, 2016.

“Market signals indicate that investors are very bearish on the prospects of Toys 'R' Us,” says Jerry H. Tempelman, director of the capital markets research group at Moody's Analytics. “There is concern in the market.”

BMO capital markets analyst Gerrick Johnson says the retailer has relinquished any modest gains made in the early days of former CEO Gerald Storch's seven-year reign that began in February 2006. (He parted ways with the company in February 2013.) Storch's favored strategy of securing more exclusives, integrating Babies 'R' Us and FAO Schwarz

into regular TRU stores, and placing more emphasis on the development of private-label products, seemed to increase the retailer's market share for a time.

"The exclusives just weren't differentiated enough," says Johnson. "And TRU's private-label products haven't been of a high enough quality to drive traffic."

The most current numbers from holiday 2013 seem to indicate that the market jitters surrounding the retailer were not unwarranted. For Q4 2013, the company reported that net sales fell to US\$5.9 billion, down US\$47 million from the same period a year ago. Same-store sales also fell 1.1% domestically and 2.7% internationally in the same quarter.

"Things are not getting better," says industry veteran Jim Silver, CEO and editor-in-chief of TimetoPlayMag.com. "Last year, TRU pulled through with a strong final two weeks. But this year pricing across the board was more competitive, and Amazon expanded its delivery service."

According to Lutz Muller, founder and president of Klosters Trading Corporation, a retail consulting firm based in Williston Hills, Vermont, TRU's market share in the US has been steadily declining over the last 12 months. It did experience a three-year period of growth between 2009 and 2012. At its most recent peak in late 2012, according to Muller's own research, TRU had a 20.2% market share. But by his last count in December, that number now hovers around 18%. "They have a couple of problems," he notes. "And most of them are self-inflicted."

The retailer's current predicament is really part of a macro-trend affecting "category killer" retailers in the US across many sectors. "It used to be that being a category killer was a good business because you could laser-focus and carry products in a specific area in such depth that you would become a destination," says Carol Spieckerman, president of newmarketbuilders, a boutique retail consultancy firm based in Bentonville, Arkansas. "But now, if you are a category killer—in an era of extreme price transparency and digital competition—frankly the jig is up."

Spieckerman argues that TRU's increased reliance on product exclusives and private-label products was not enough to compete with heavyweight e-tailers like Amazon. "If you have one main category, you are going to be vulnerable to digital operations that can do your business with greater efficiency and lower overhead while being more agile."

It's a business model with a heavy burden, says Vanessa Hartnoll, an independent retail expert and former global head of shopper insights for research firm Hall & Partners. "It has been an issue that category-killer retailers are reluctant to change," she says. "TRU's objective from the time Gerry Storch took over was to be the 'biggest toy retailer in the world.' Is that really the right strategy? TRU put itself in direct competition with Walmart, Target and Amazon." And any victory achieved by arming for that particular big-box battle would be pyrrhic at best, she adds. "Saying you are going to compete on price and stock availability with those big-box stores is a big problem."



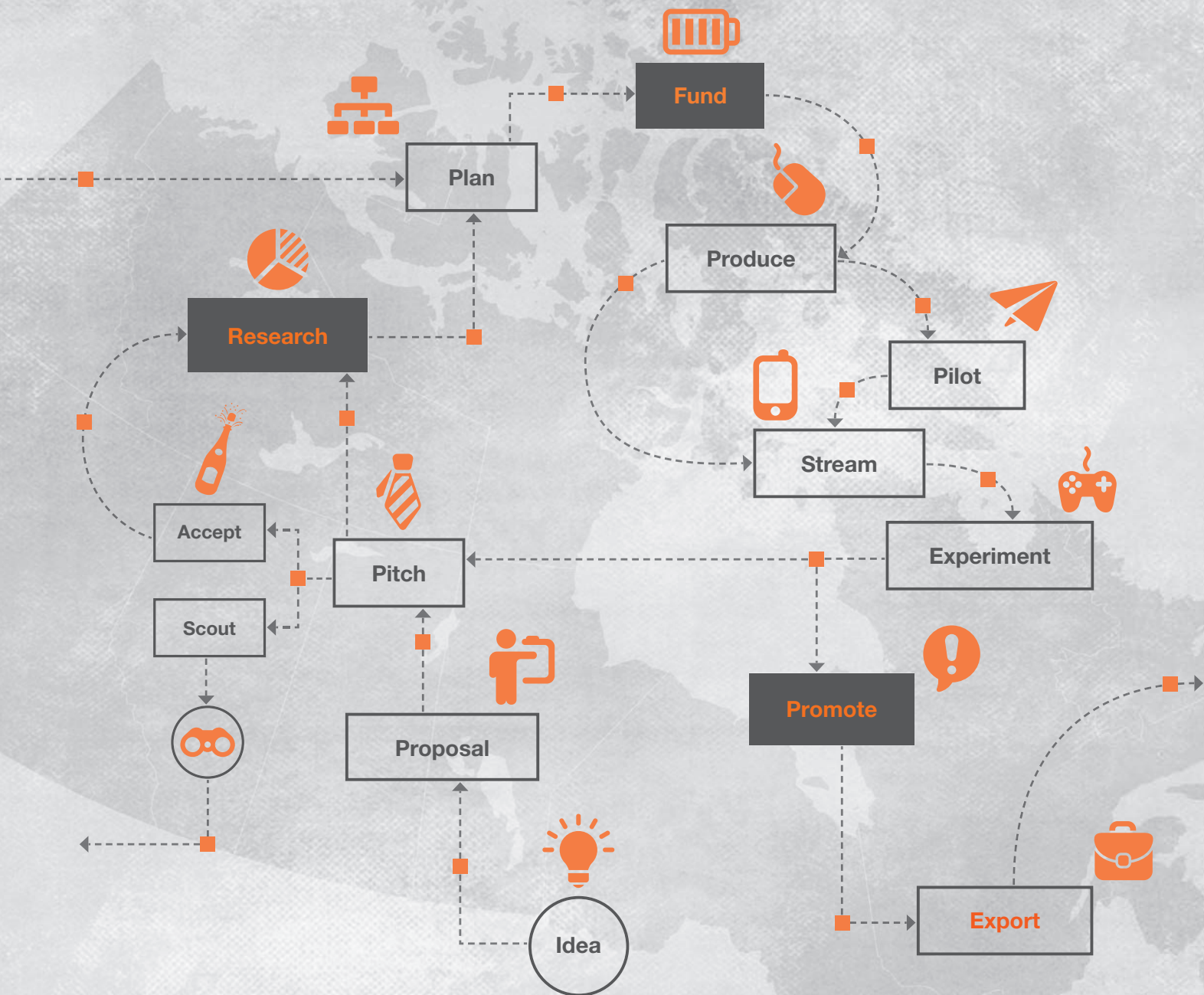
TRU's recent dedication of 15% of its floor space to physical videogame sales was a major misstep, according to one analyst

Muller agrees any strategy that pits TRU against the Walmarts of the world, where competition is based strictly on price and product availability, is destined to be fruitless. "The danger is that, if it stays with its existing model, and TRU doesn't make money in the fourth quarter, it is toast," he says. "But its big-box competitors can afford to sell all their toys at a loss in that quarter."

TRU has faltered in its pricing strategy, says Muller. He recently compiled a list of the top-20 toy items from Amazon.com in the US and compared their price and availability at TRU. The results speak for themselves. "Ten of the 20 toys, Toys 'R' Us didn't even have in stock," he says. "The other 10 were on average 17% more expensive."

Another fundamental misstep, Muller believes, is the use of the stores' physical space and what he describes as some peculiar merchandising decisions. "TRU recently devoted 15% of its floor space to videogames," he says. "That is very odd because you have a consumer electronics market characterized by innovation and rapid growth, and then you have 15% of store real estate devoted to videogames at TRU, whose physical software sales have been falling off a cliff."

Hartnoll says the stores themselves are challenged environments. "It feels like a warehouse in there," she says. "On a basic level, there are outdated fixtures and features that are not keeping pace with the packaging being created by toy manufacturers." She adds that the retailer missed an ideal opportunity this past holiday shopping season to showcase new big-ticket items and traffic-driving consoles like Xbox One and PlayStation 4. "The stores were, for the most part, poorly merchandised," she says. "At their most basic level, the stores are all disruption and clutter in the aisle, and that is also a real problem."



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Just before the holiday season, TRU hired a new CEO to steer the ship. However, the appointment of Antonio Urcelay, former head of its European operations, did little to placate investors and analysts.

"It took an eight-month search for them to hire internally," says Silver. "Right now, no one knows exactly what the new vision is."

BMO's Johnson says that the financial community was nonplussed by the decision. "I think people were disappointed that it wasn't an outside thinker," he says. "Of course, Gerry Storch was from the outside, and what he did didn't meet with great success either."

Stephanie Wissink, co-director of research at Minneapolis, Minnesota-based analytical firm Piper Jaffray, also questions the choice of an internal hire from the international side of the business. "TRU has fielded merchant-driven executives in the past," she says. "But the disconnect here is that it will have to do a re-model. The model, at least domestically, has to be recalibrated. And bringing in a leader who has been in growth mode on the international side, and having him apply that logic to an overall operations strategy, might not be easy."

Exacerbating these issues is what Hartnoll describes as the long-standing reluctance of the retailer to embrace the online marketplace and fully integrate it into its operations chain-wide. "Gerry Storch's original comments about online retailing when he first started showed that he saw it as an 'either-or' situation and not an 'and/both' proposition," she says. "TRU didn't move quick enough to react to the change that was coming."

Hartnoll says while TRU offers forward-thinking policies, such as using the physical store locations as pick-up centers for online purchases, its online experience largely falls far behind those of its competitors. "What makes a brand is the experience you have every time you interact with it," she says. "I don't see that online or in-store at all. There should be a consistent culture that pervades all channels and, at this point, TRU doesn't have that."

It's not all bad news, though. Admittedly, these analysts are not painting a pretty picture. But, it is important to remember that while TRU's market share and profitability have been slipping—and its debt load could become more onerous with each bond downgrade—time is still on the retailer's side. "If you look at its bond, the big debt isn't due until 2016," says Silver. "If the debt was due next year, you would hear more alarm bells."

Muller concurs. He notes that although there is a danger that TRU's debt will continue to get more expensive to service, the retailer is a long way from shuttering operations. "It will not go out of business now," he says. "There is no danger of that."

Another factor keeping TRU's doors open is the open cooperation it has from its major and minor suppliers, which see the retailer as a good bet to hedge against the predominance of big-box stores. "Toys 'R' Us is a flagship

store for all of these big toy brands," says Spieckerman. "There aren't that many other retailers, so for the manufacturers it's very important that TRU stays open, or they will be further subjected to the demands of fewer retailers."

Spieckerman says that active participation from these brands played a part in making the exclusive and private-label strategy work for as long as it did. "The brands accepted that to an extent because they need TRU," she says.

Piper Jaffray's Wissink agrees that the supply side of the equation will do what it can to protect a major retailer in the sector. "I think a US\$20-billion toy industry and the US\$14-billion infant products industry can't necessarily just let TRU fail."

Another valuable asset for the retailer is its extensive real estate holdings and the power that can be leveraged from more than 800 US store locations and 700-plus in-

"I think the US\$20-billion toy industry and the US\$14-billion infant products industry can't necessarily just let TRU fail."

—Stephanie Wissink, Piper Jaffray

ternational ones found across 35 countries. "There is a real incentive from landlords to work with TRU and Babies 'R' Us," says Wissink. "Having dormant stores in these big shopping centers is not what a real estate owner wants. No one wants to drive up to a vacant [mall]."

The physical space TRU inhabits will be a key element in any upcoming strategic transformation. In fact, using the store locations is elemental to the re-alignment of its business model. "TRU could be more experiential and offer something that kids can't get elsewhere," says Johnson. "It could become more of a play store than a toy store."

Hartnoll has a similar prescription. "Don't design a store as if you are selling products; you should design it to create an environment for people who already own the products—one that stresses the user experience." She cites recent updates made to Harrods' toy department at its London flagship store and John Lewis, also in London, as well as Disney and Lego stores, as good examples of the types of interactive and immersive experiences that serve

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to differentiate those retail outlets from big-box and online competition. “You need an exciting environment every time you go in there, and it has to be related to what you are selling,” says Hartnoll. “That way, you will become a destination for toys.”

Spieckerman says that the retailer’s early attempts at creating more experiential and immersive environments were not fully realized. “I don’t know if TRU has gone into enough depth for it to be truly experiential,” she says.

In contrast, The Disney Store has crafted a narrative and a point of view—in terms of what products are going to be showcased and in what ways—in its individual locations, observes Hartnoll. “It’s basic organization,” she says. “There needs to be more of a curated feel to the product assortments.”

Wissink agrees that the experiential showcasing of products is a strategy that TRU would do well to embrace. “Instead of creating a shopping experience oriented around consumption, it has to create an experience around the products themselves,” she says. Additionally, she suggests that the retailer might use its large physical space more fully in the future to woo millennial moms by offering a number of new services, including those only tangentially related to the core product. “You can start to envision things like a Lamaze class, a clinic for immunizations, or a music class,” she says. “TRU has to start thinking in terms of getting the most out of its square footage.”

Then there’s the name, itself—it’s another asset that the retailer could exploit and build upon. After more than 60 years in business and millions of dollars spent in advertising and marketing, as a brand Toys ‘R’ Us still occupies a place in the popular consciousness of consumers.

“There is a lot of brand equity in that name,” says Johnson. “Brands like that don’t just go away. They can withstand damage and loss of relevancy and then can be brought back.” He offers up Apple as a prime example of the phenomenon. Arguably the world’s most popular brand now, it went through a dormant period before developing a string of innovative products in the early 2000s that brought it back to prominence. In the retail realm, Johnson points to Macy’s as a brand that has hit some hard times but has recently rebounded to distinction. “There was a wonder and awe about going to Toys ‘R’ Us when I was a kid,” says Johnson. “You really need kids to ask, ‘When can we go to Toys ‘R’ Us?’ That is what is missing now.”

With a precarious future looming, the expectation is that TRU will send some clear signals sooner rather than later about its next steps to both suppliers and consumers. In fact, just last month, the retailer announced a partnership with US pregnancy and parenting website Bump.com to expand its gift registry offering. The move signals an interest in forging partnerships and diversification that analysts say is exactly what the retailer

needs to regain relevance in the market. Of course, more announcements on further initiatives are expected.


“I would hope for some announcements around Toy Fair time in terms of new directions and new merchandising initiatives,” says Johnson.

Spieckerman, too, expects some sort of strategic plan to be announced during the traditionally slower early months of the year. “TRU has to make some bold moves, in stores and online,” she says. “The post-holiday period would be a good time for it to show some newness and put forth some



great new concepts. It is going to take a lot of determination and positivity.”

However, Hartnoll is less optimistic about just how much innovation the retailer can actually afford, given its debt burden. “A total reinvention and revolution is required, and the question is whether or not TRU will have enough money available to re-invest in that,” she says.

Silver also expects some major announcements and strategic moves to be made in order to instill confidence in vendors and consumers alike before the balance of the company’s debt comes due. “TRU has to make it better,” he says. “2016 is only two years away now—it really is right around the corner.” 

Experts believe investing in more experiential in-store efforts, like this Superman boutique, could help Toys ‘R’ Us rebound



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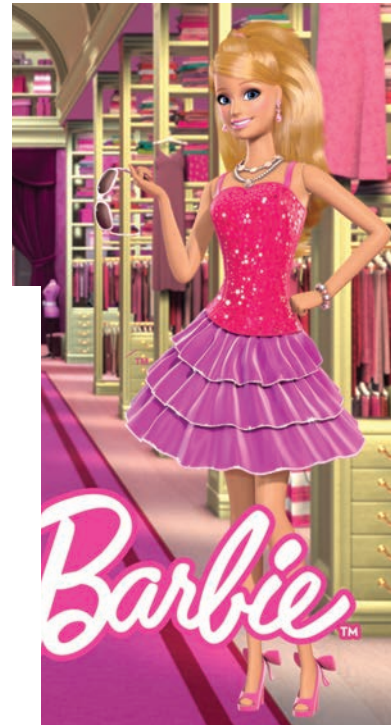
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